THINK! Country Roads presentation

January 2015

Agenda

- Background
- Overview of key findings
- Behavioural study
- The GPS data collected
- Driving Behaviour on Key Metrics
- Behavioural study survey
- Campaign awareness and recognition
- Campaign communication
- Attitudinal Changes
- Insight and Recommendations

1
Background

Background

60% of road fatalities occur on country roads, with the main factor being loss of control

As such, DfT ran a campaign around the hazards of driving on country roads, dramatising that there can be unexpected hazards around the bend

The key message of the campaign is to brake before the bend, not in it

The key target audience was 17-35 year old male drivers who drive on single carriage country roads at least occasionally with the secondary audience of all drivers

The campaign ran on radio, VOD, petrol stations and cinema from 9th October – 3rd December 2014

Campaign mix and spend

Activity	Spend	Start date	End date
Radio	£306,054	9th Oct	11th Nov
Online including Video on Demand	£502,133	9th Oct	30th Nov
Petrol station	£92,471	9th Oct	3rd Dec
Cinema	£264,802	10th Oct	27th Nov
Total media	**£1,165,461**		

NOTE: Net media, including all fees ex ad agency commission. All figures exclude Radio CM.

Summary of research approach

To investigate actual behaviour change:

GPS tracking inserted into the cars of 30 males aged 18-35 who drive on country roads regularly, for a period of a week pre campaign and a week post campaign

Changes in actual behaviour analysed from multiple angles

Quantitative pre and post advertising survey:

Online survey amongst drivers pre and post the campaign to measure awareness, take out and attitudes

750 general population drivers at each wave, of which 250 young male drivers aged 17-35

Pre wave conducted: 23rd – 29th September 2014

Post wave conducted: 26th November – 1st December 2014

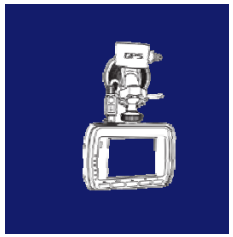
2
Overview of key findings

Overview of key findings

1. The campaign worked well at decreasing overall average speed and corner entry speed on rural roads
2. Multiple exposures to the campaign increase its effectiveness in reducing speed before the bend
3. Awareness of, take out and personal communication from the VOD/online ad is highest of all the media used
4. Attitudinally positive shifts from before to after the campaign amongst YMD in terms of recognition that they don't drive in the way they should

3
Behavioural study

A reminder: 4 parts to the process



1. Driver Behaviour Tracking

Tracking the driving behaviour of 30 Young Male Drivers.

From 1st October to 8th October 2014 (Pre Campaign Launch)

Survey & Exposure

All drivers completed an online survey asking about free & aided recall of the campaign - then exposed to campaign as part of 6 ad reel – recall questions asked again.

2. Driver Behaviour Tracking

Tracking the driving behaviour of 30 Young Male Drivers.

From 3rd November to 10th November 2014 (Post Campaign Launch)

Survey

Drivers completed a final online survey. Had they seen or heard the campaign elsewhere & whether they thought the campaign had affected their driving, and how?

How does Driver Behaviour Tracking work?

Nuts and Bolts

- **GPS Tracking**
- **HD video**
- Wide angle lens
- Device **sent to drivers** and easily installed on their windshield
- No interference with everyday driving
- No external storage device necessary
- No images of inside the car captured
- Power supply via cigarette lighter socket
- The device **starts recording automatically** once the vehicle's engine is turned on
- On engine shut down, the device automatically saves the recording and turns off

KPIs

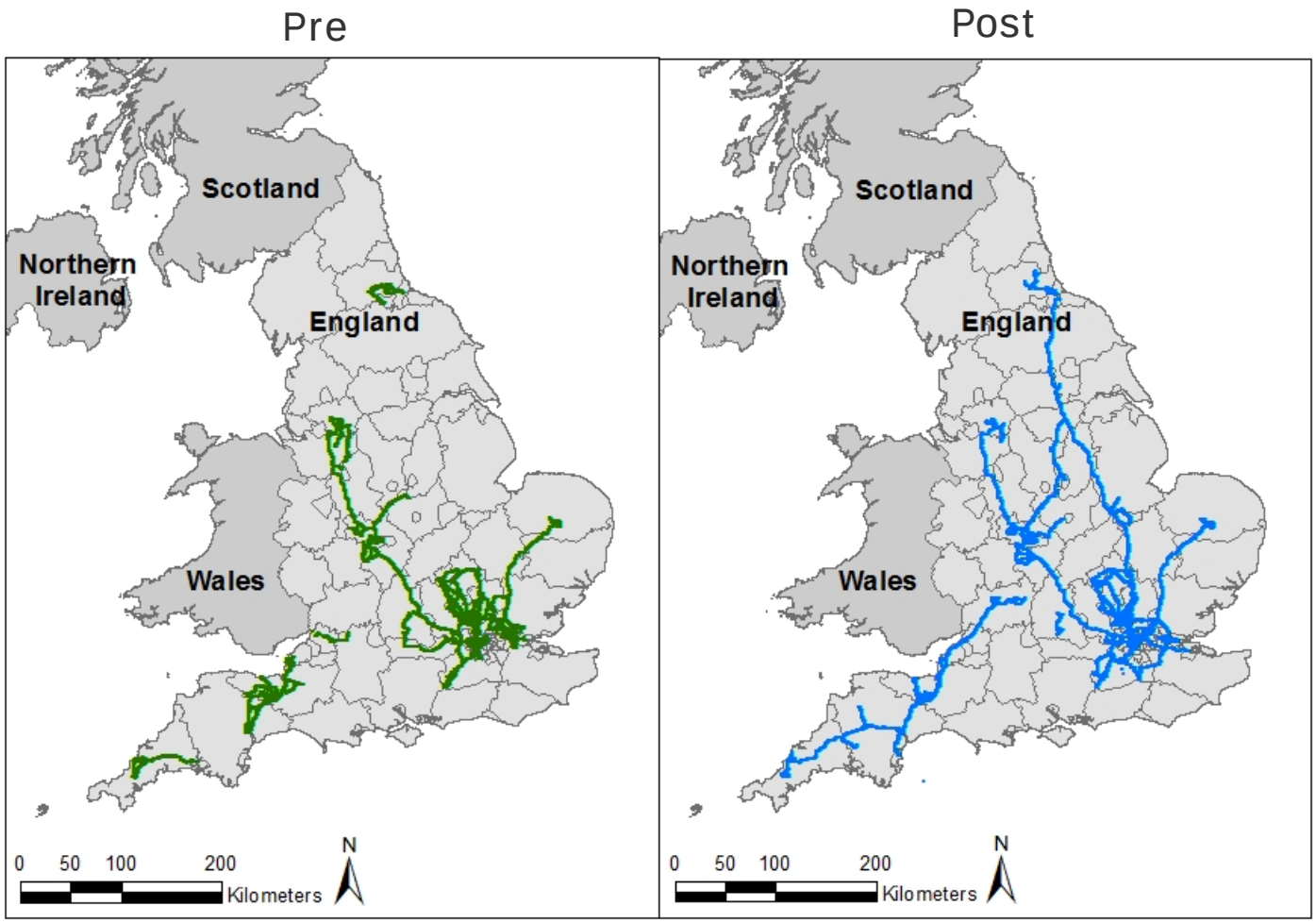
Driving during Pre-launch and Post waves compared on country roads as to:

- The time before the corner that deceleration occurs
- The velocity at which drivers enter corners
- The average velocity

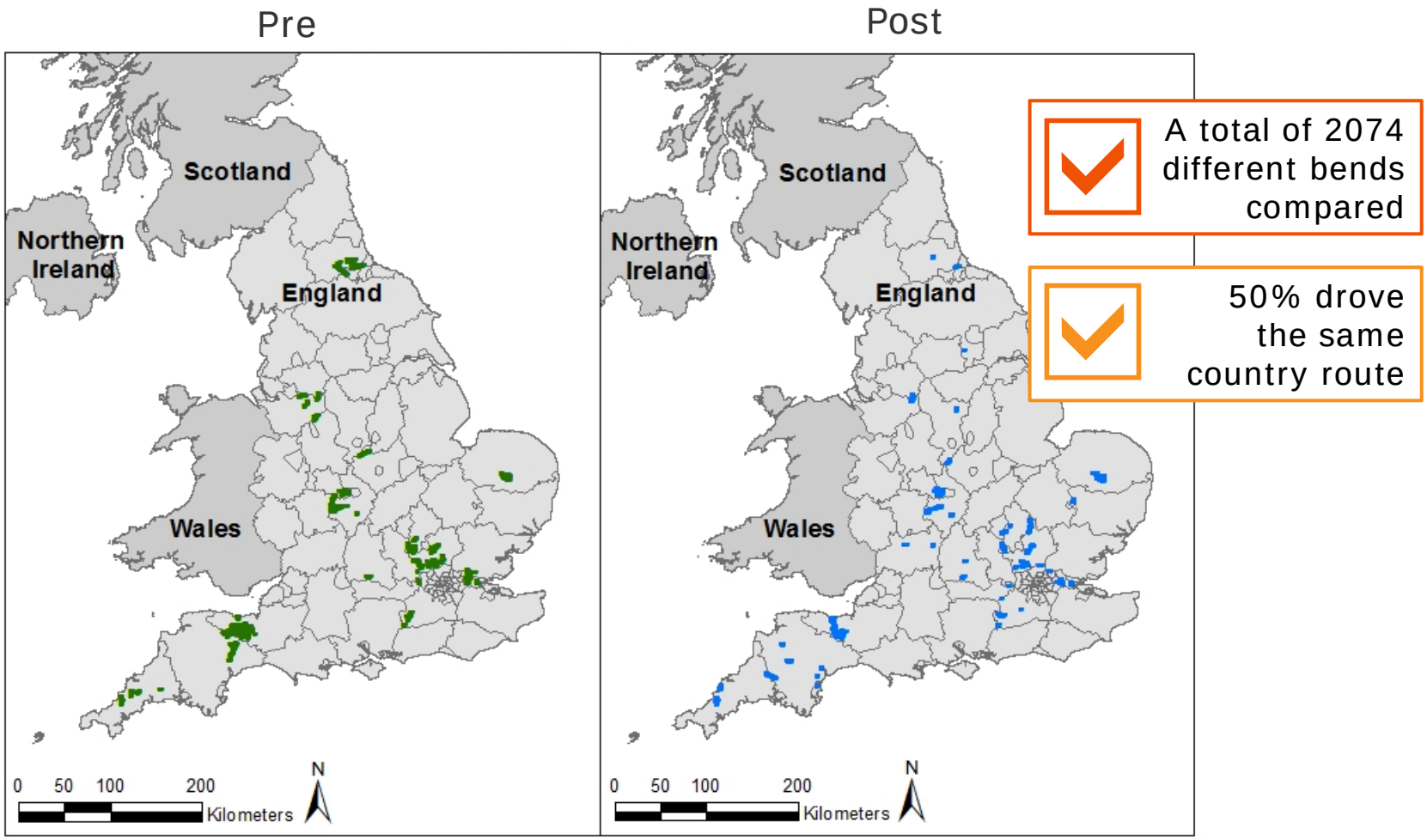
4

The GPS data collected

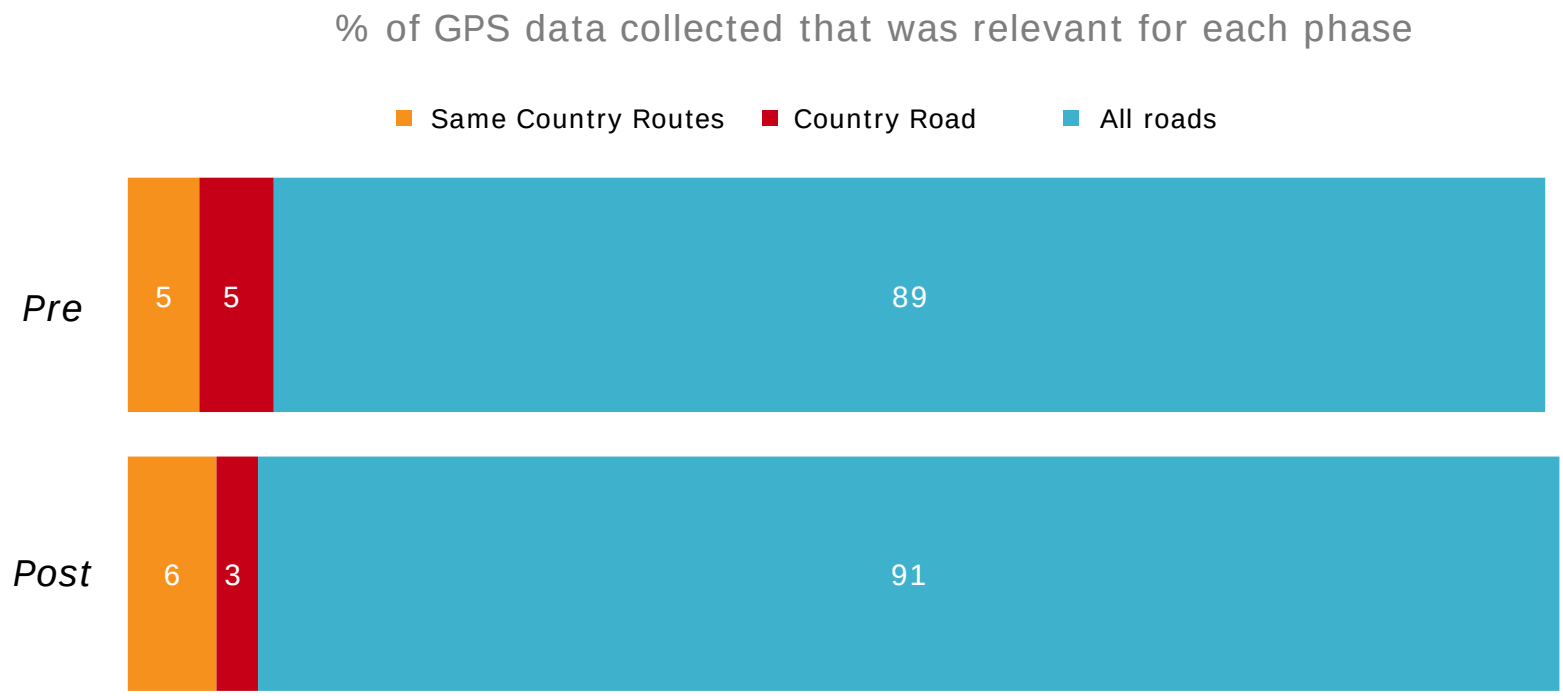
Greater distribution of routes driven on all roads in Post Launch Phase



Comparable country roads driven in Pre-Launch and Post waves



Similar amount of GPS data available in both waves



Rural roads made up **120413** (10.2%) in Pre and in Post **84172** (9.1%)
For the final same route statistical analysis, **58817** GPS coordinates in Pre (5.0%) and **57692** in Post (6.2%) were included

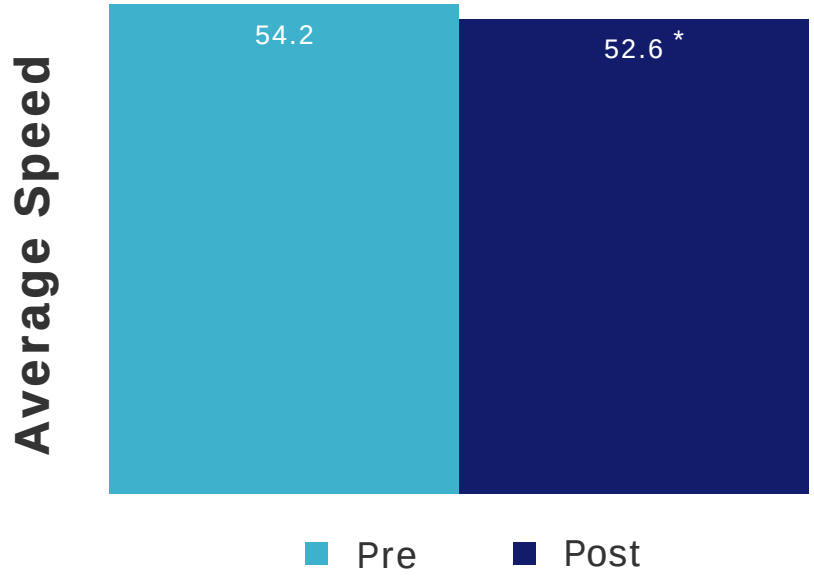
Not all bends are created equal, 6 classifications of bends used

Bend Class	Radius in metres
A	>= 506
B	>= 321 and <= 505
C	>= 206 and <= 320
D	>= 126 and <= 205
E	>= 61 And <= 125
F	< 61

Provided by the Florida Department of Transportation
Transportation FDo. Curvature Class Ranges. Florida Department of Transportation; [cited 2014 Nov 12]; Available from: http://www.dot.state.fl.us/planning/statistics/curvaturehelp/Curvature_Extension_Help.htm

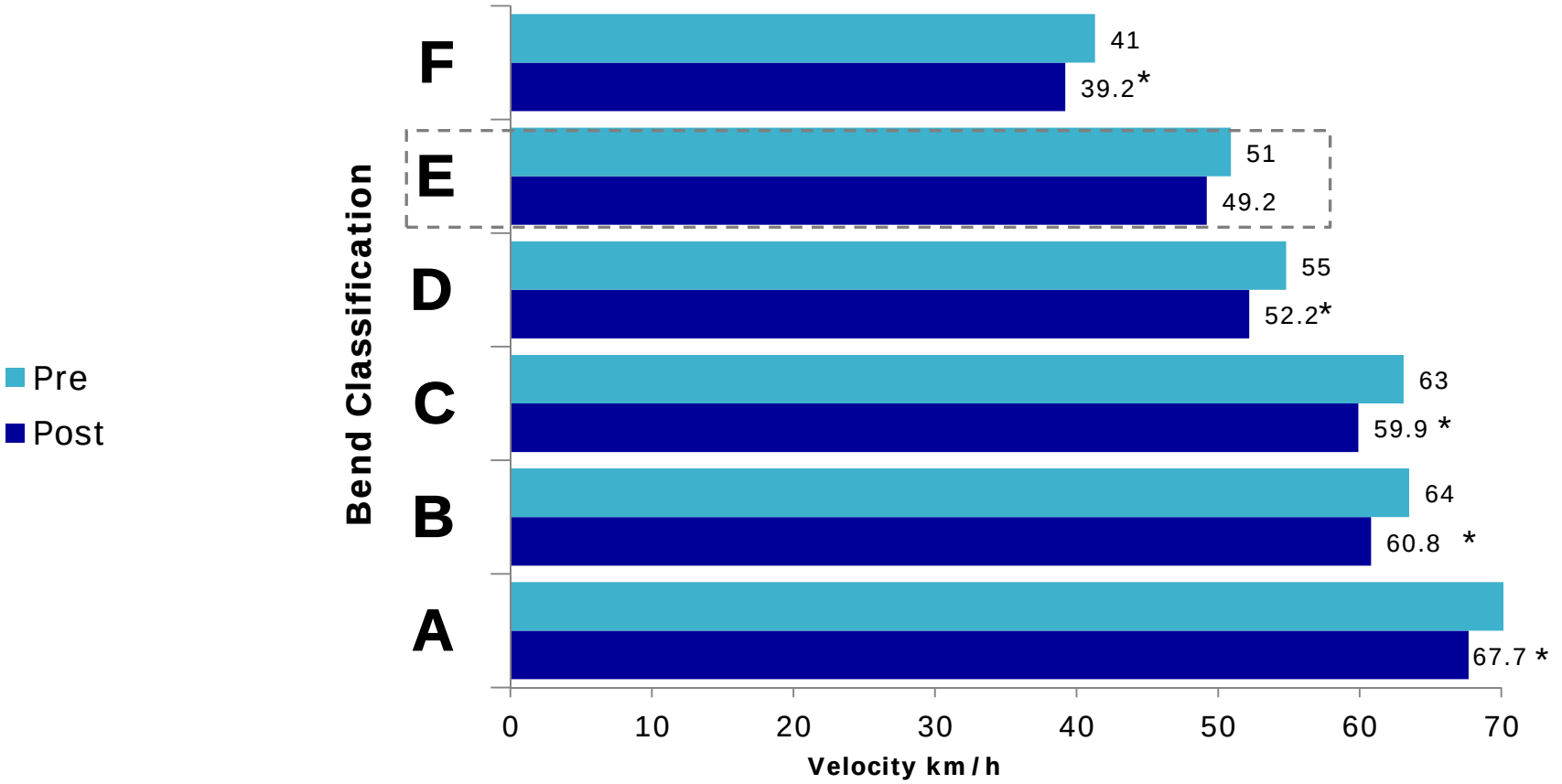
5
Driving Behaviour on Key Metrics

The average driving speed on country roads was significantly slower in the Post-launch phase



*indicates difference from all respondents with statistical significance at 95%

The average speed on country roads when cornering started was significantly slower in the Post-launch phase

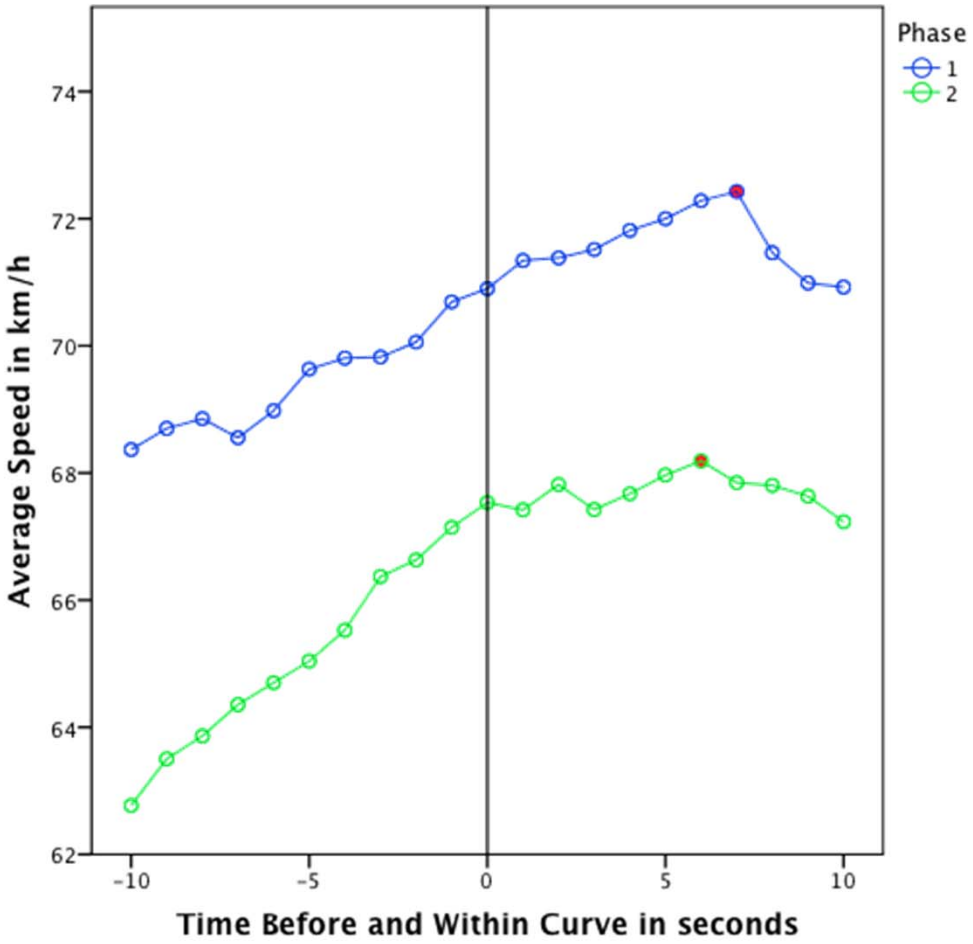


*indicates difference from all respondents with statistical significance at 95%

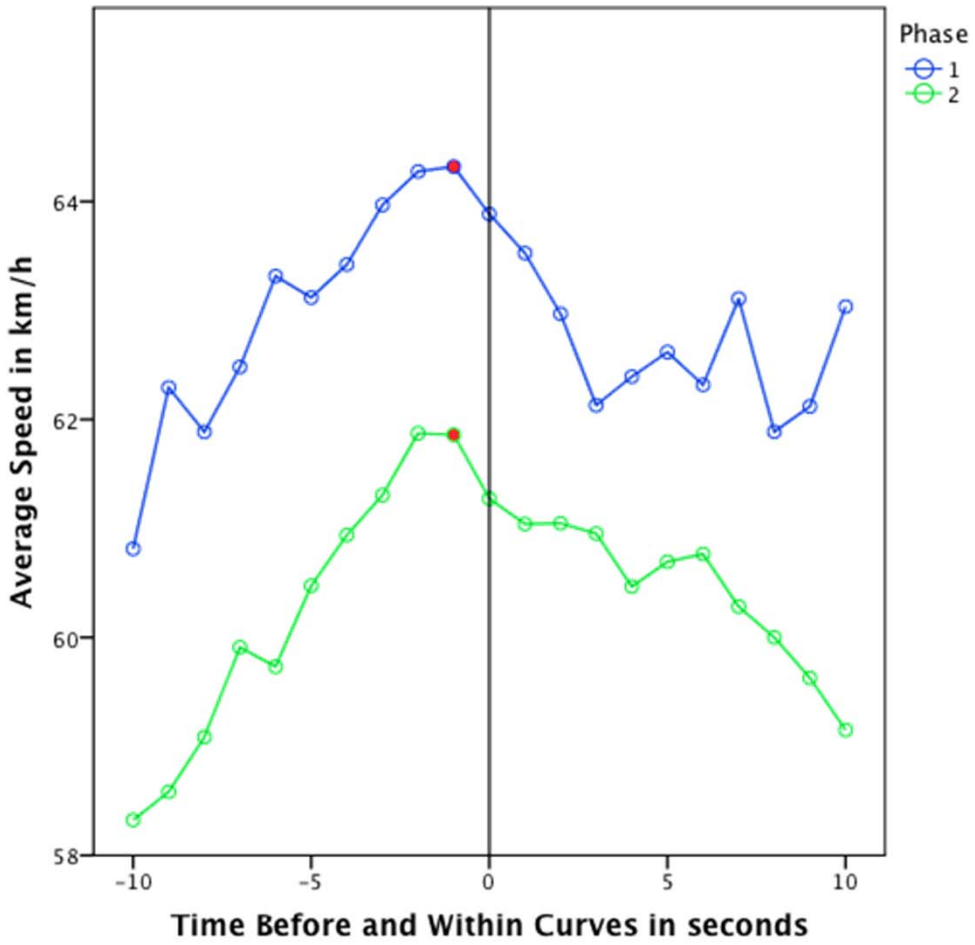
Drivers started decelerating earlier in the Post-launch phase on most types of bends on country roads, particularly the tighter bends (D, E & F) where visibility around the bend is most likely to be reduced

Bend Type		
A	Decelerated Earlier in Post	✓
B	No difference	
C	Decelerated Earlier in Pre	
D	Decelerated Earlier in Post	✓
E	Decelerated Earlier in Post	✓
F	Decelerated Earlier in Post	✓

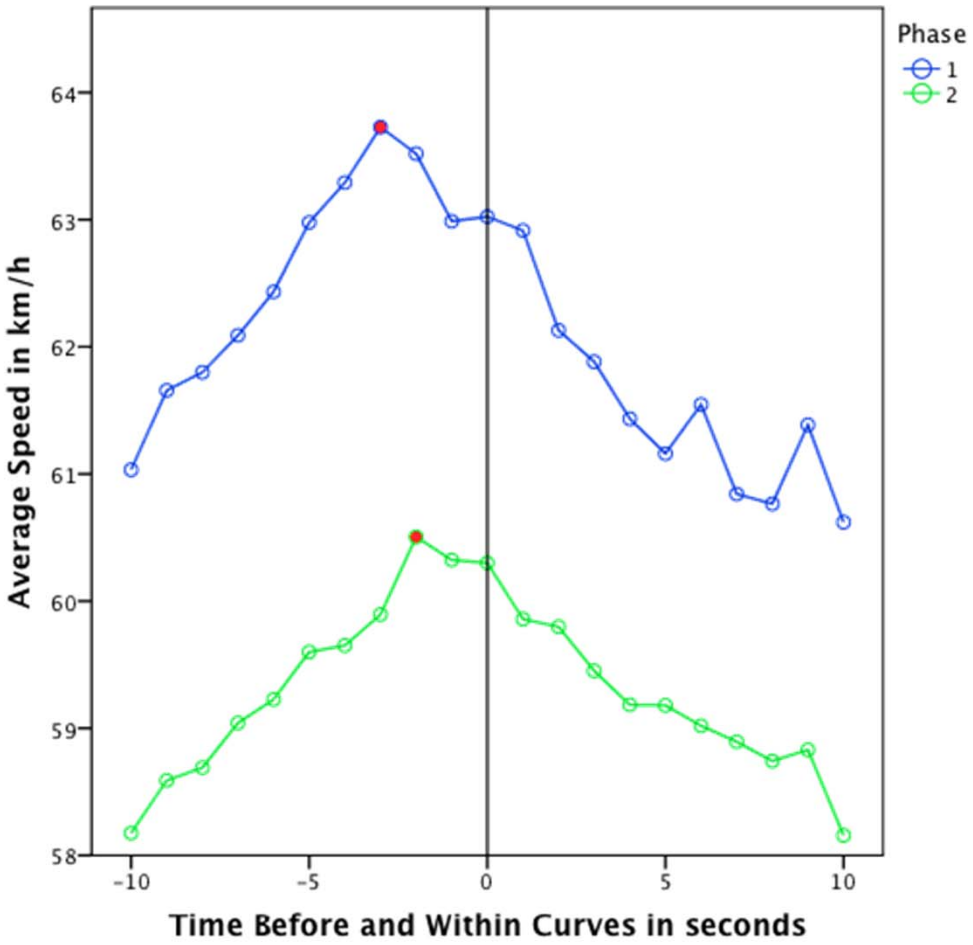
Drivers started braking earlier the in Post-launch phase for the gentlest of bend types (A) – although deceleration did not start until well after they had entered the bend in both phases



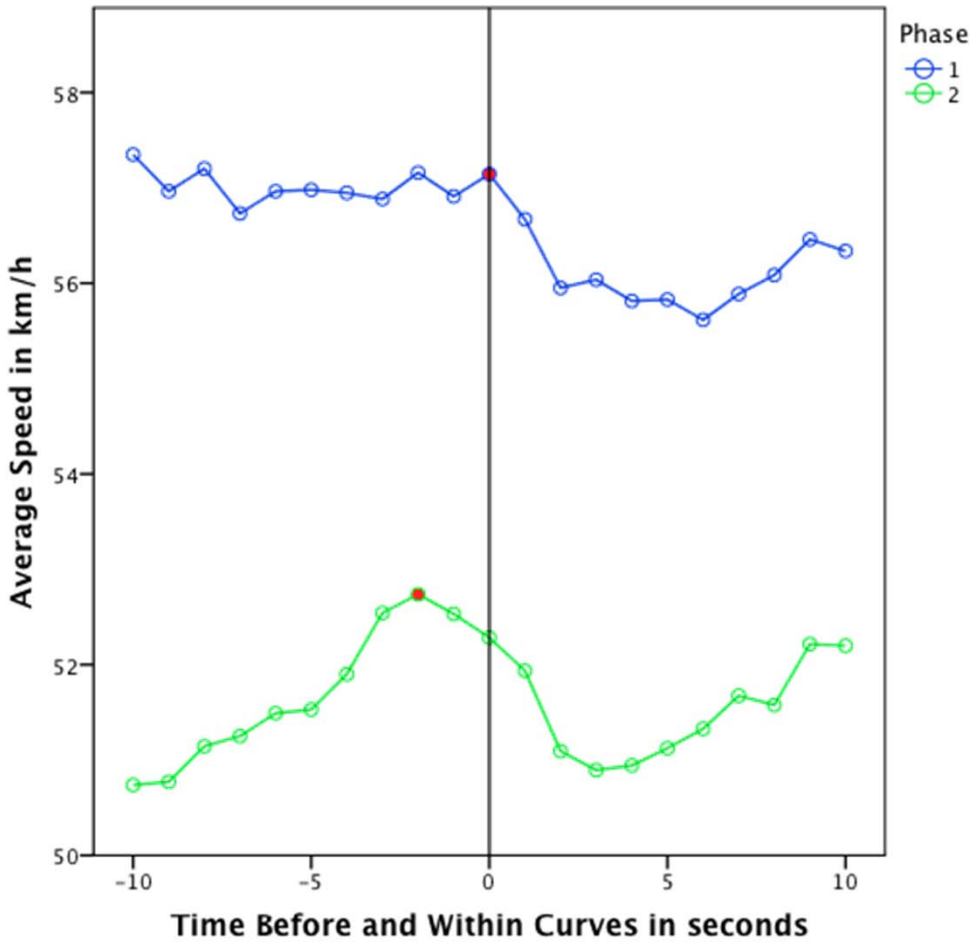
Braking for the second most gentle types of bend (B) started at a similar duration before the bend for both Pre and Post phase



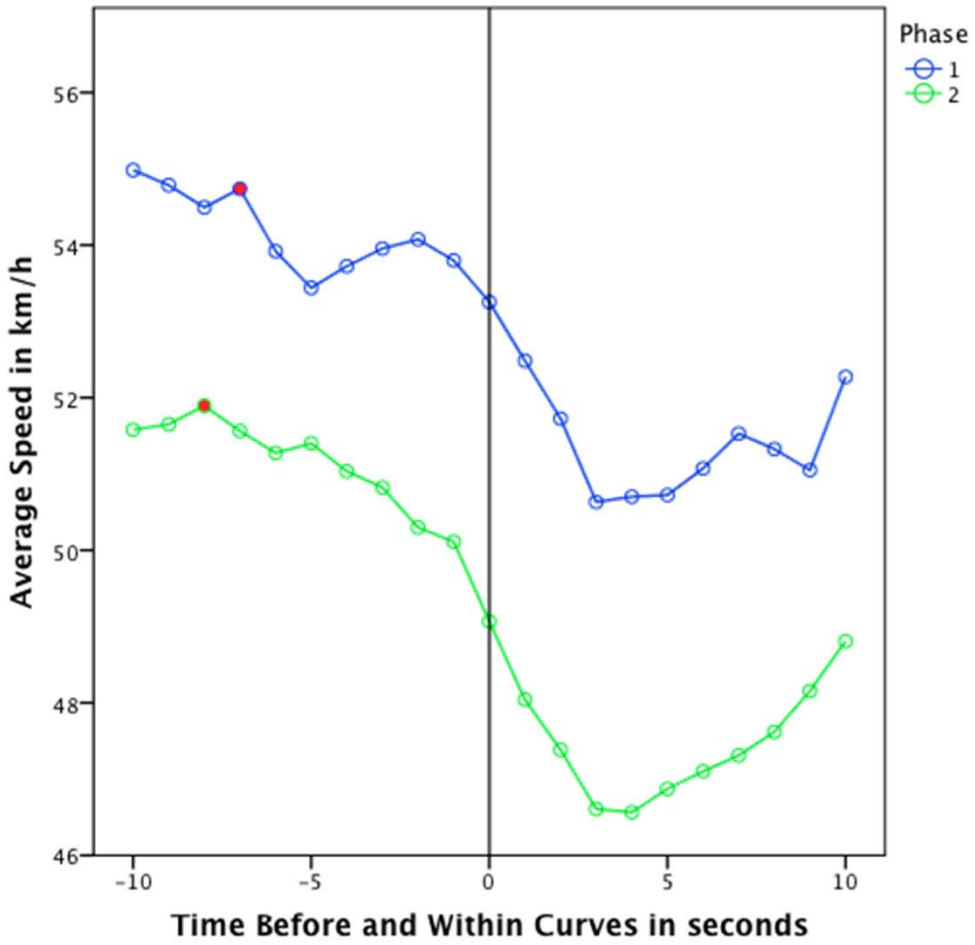
Braking started earlier for bend types C in the Pre phase



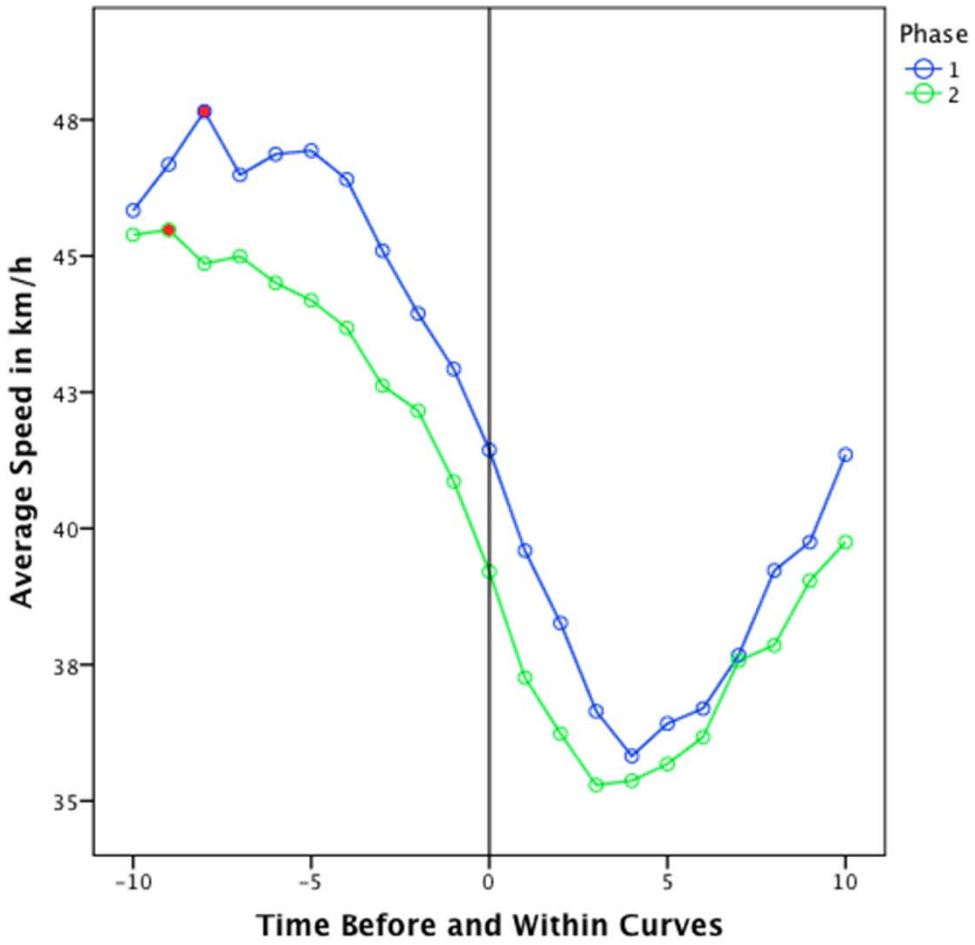
Braking started earlier for bend types D in the Post phase



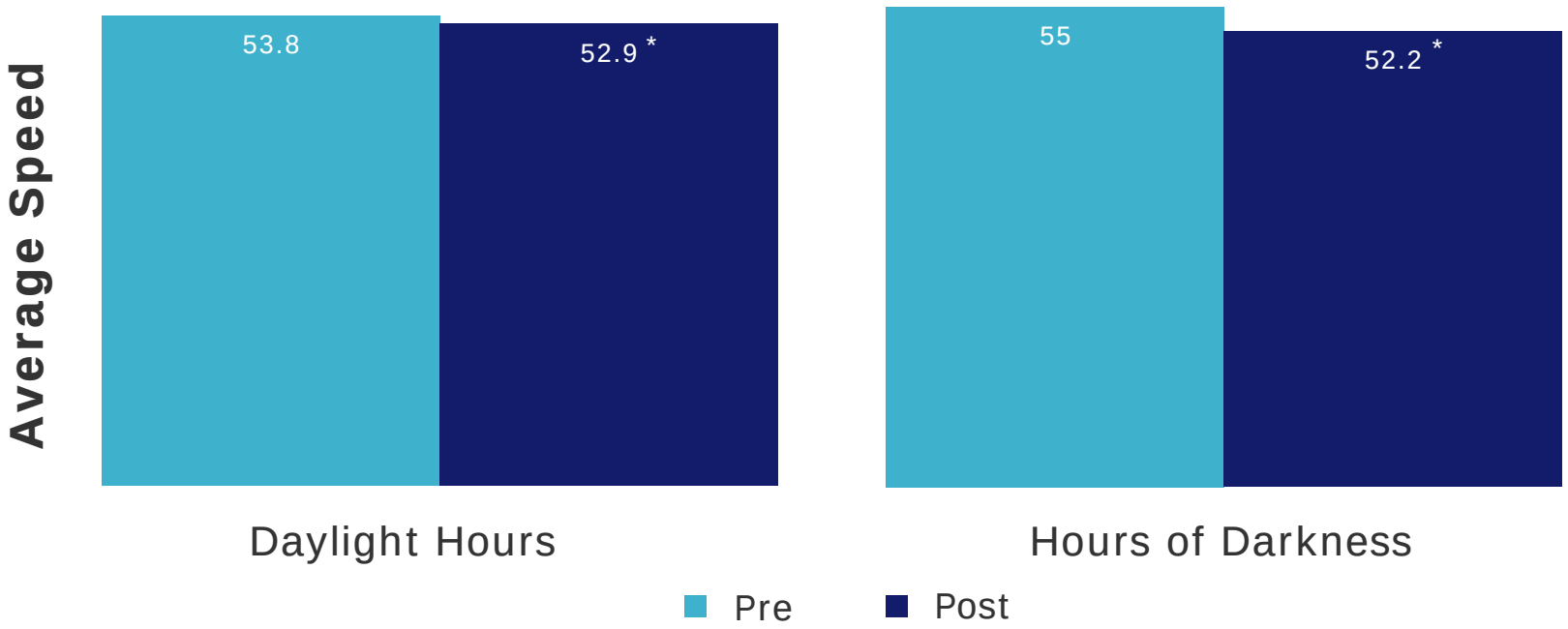
Braking started slightly earlier for bend types E in the Post phase



Braking also started earlier for bend types F in the Post phase, these were the sharpest types of bend

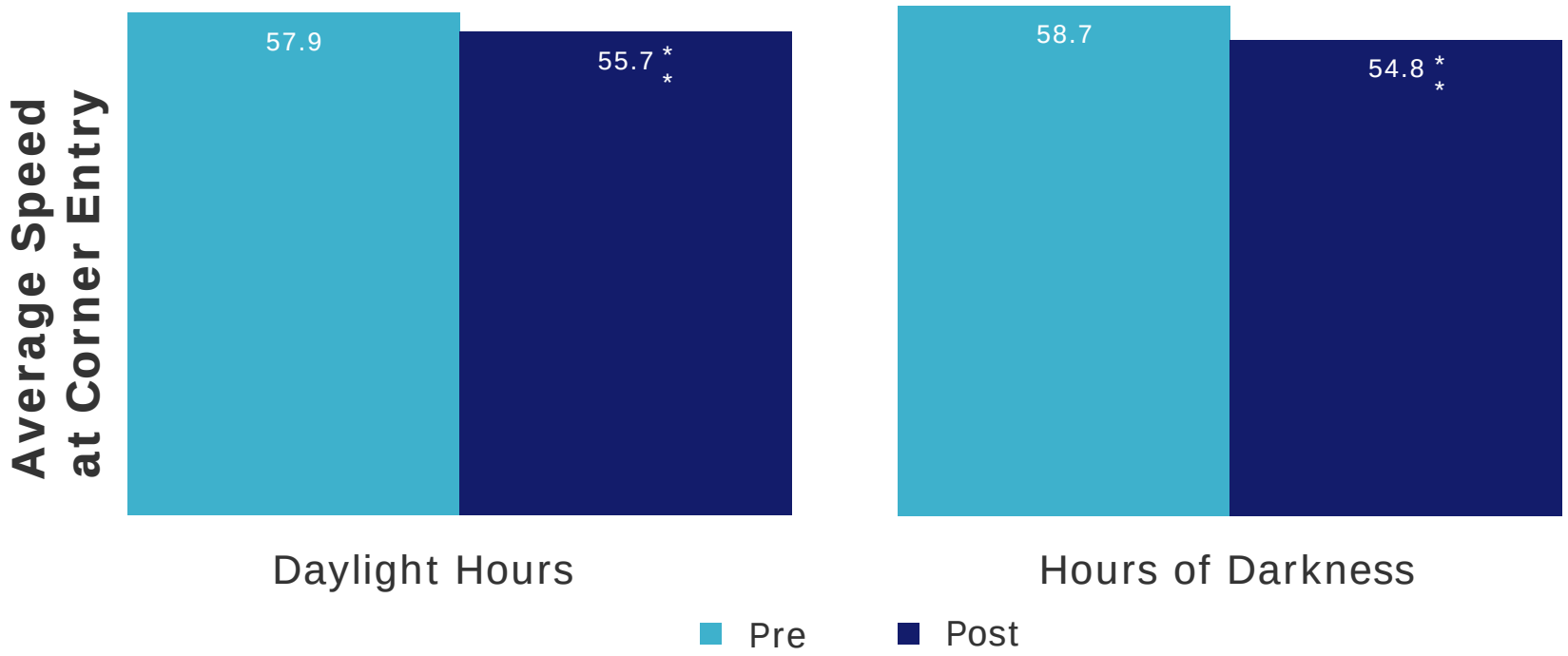


Average speed during hours of darkness and daylight was significantly slower during the Post Launch phase



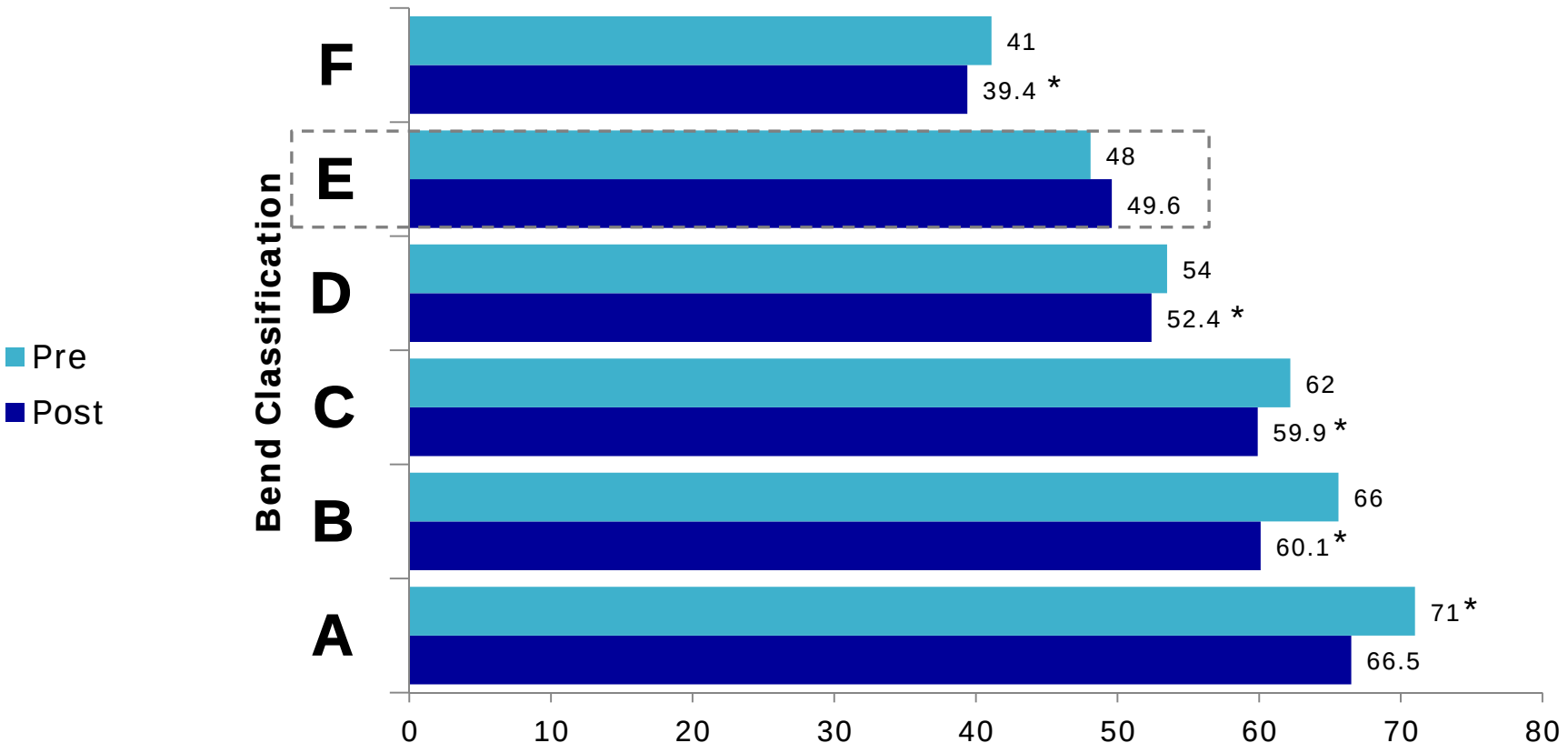
*indicates difference from all respondents with statistical significance at 95%

Average corner entry speed was significantly slower during the Post Launch phase both during darkness and daylight hours



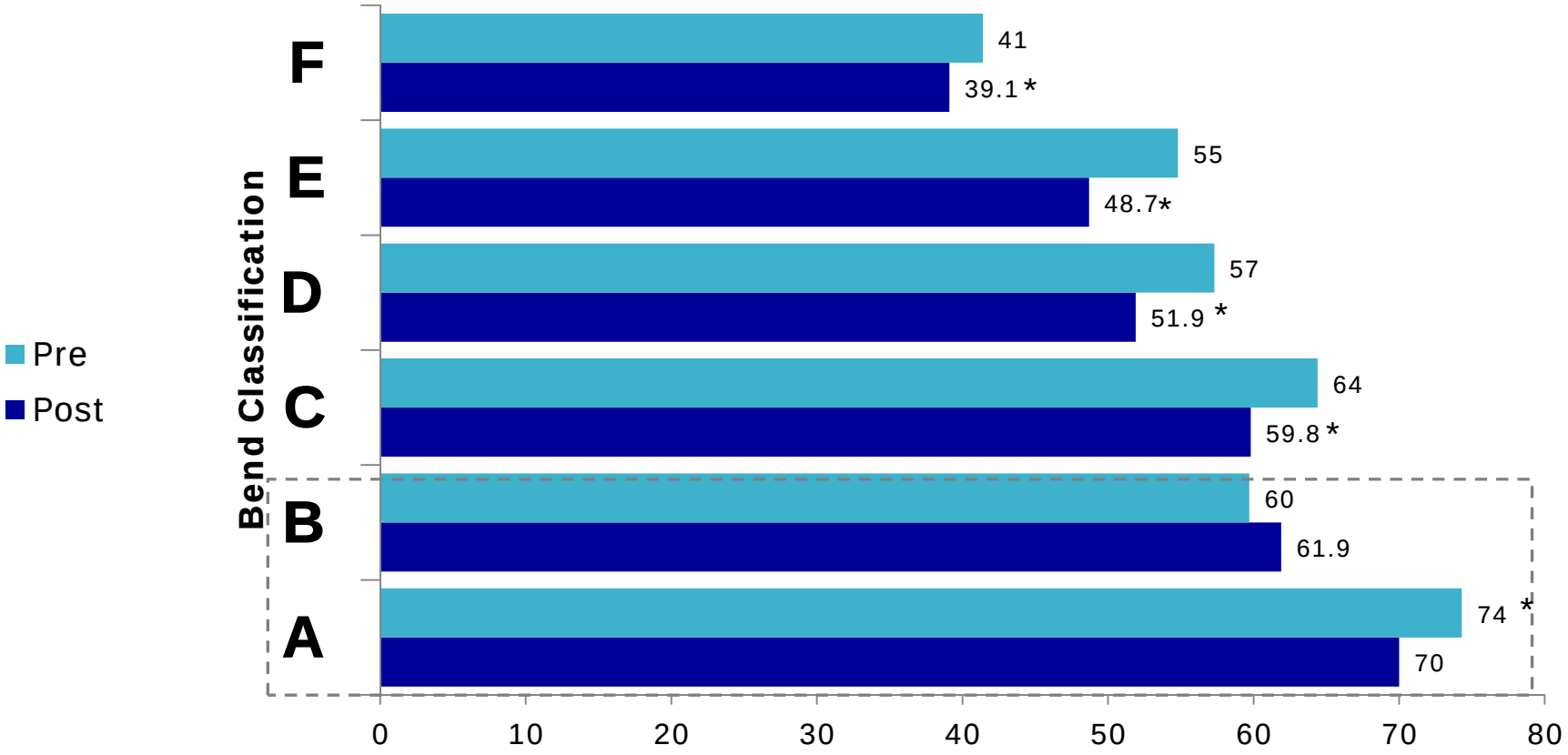
*indicates difference from all respondents with statistical significance at 95%

During daylight the average speed on rural roads when cornering started was significantly slower in the Post-launch phase



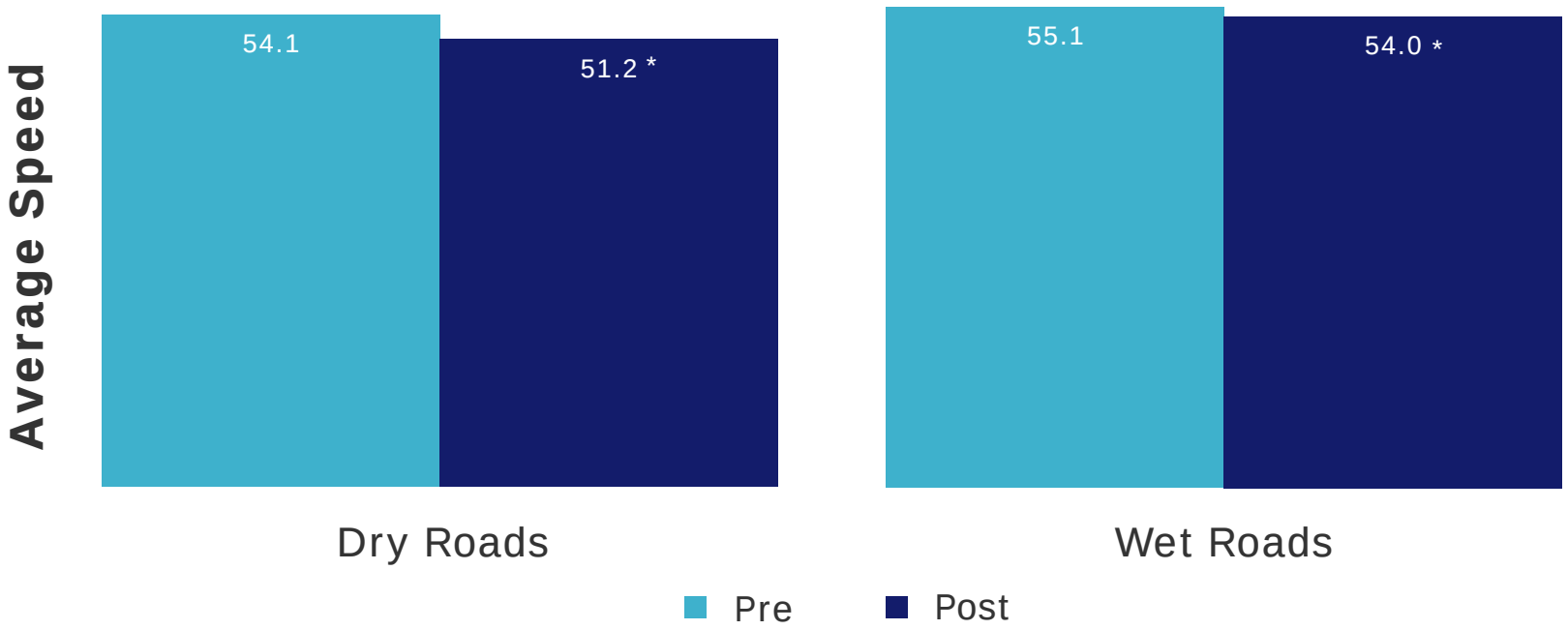
*indicates difference from all respondents with statistical significance at 95%

During darkness the average speed on rural roads when cornering started was significantly slower for the sharpest types of bends in the Post-launch phase, but not for the smoothest types of bends



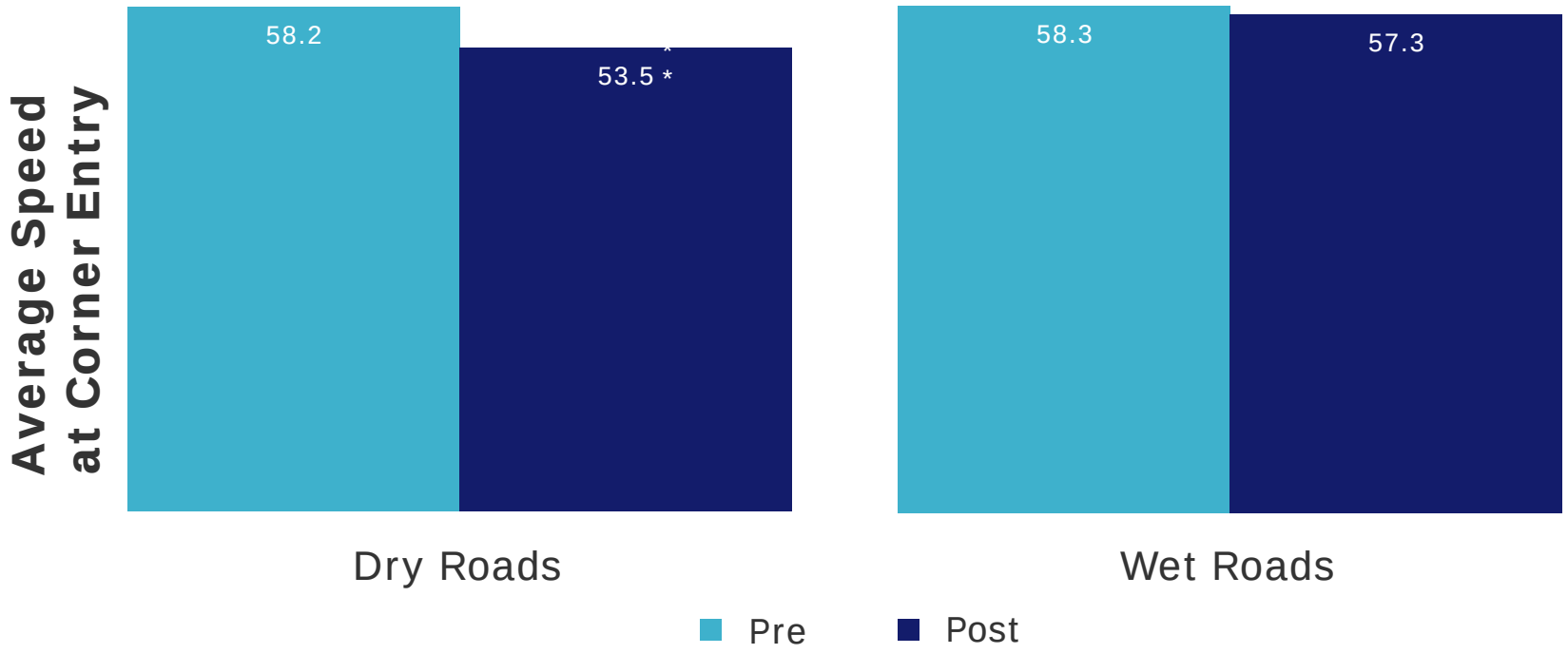
*indicates difference from all respondents with statistical significance at 95%

Average speed on dry and wet roads was significantly slower during the Post Launch phase



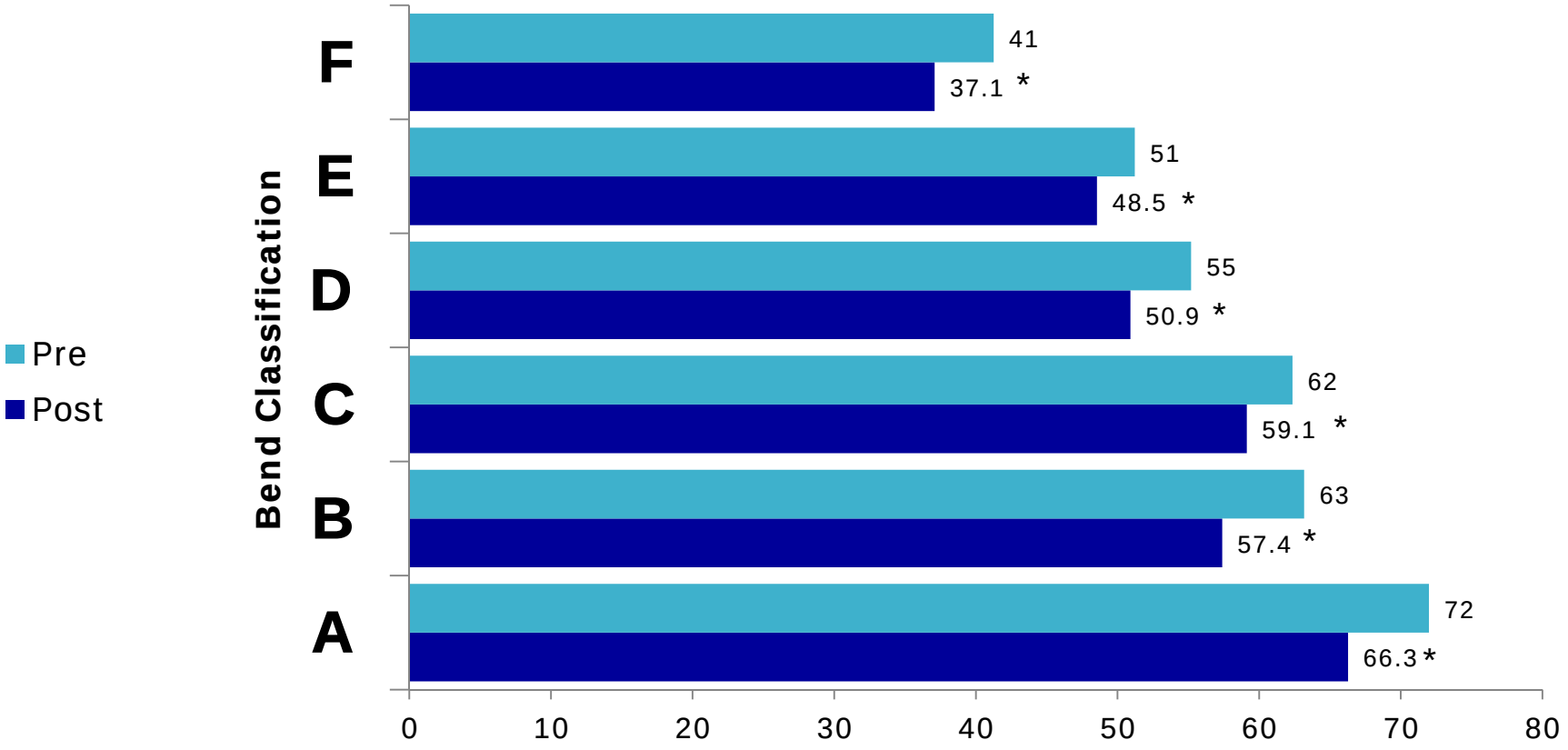
*indicates difference from all respondents with statistical significance at 95%

Average corner entry speed was significantly slower during the Post Launch phase on dry roads



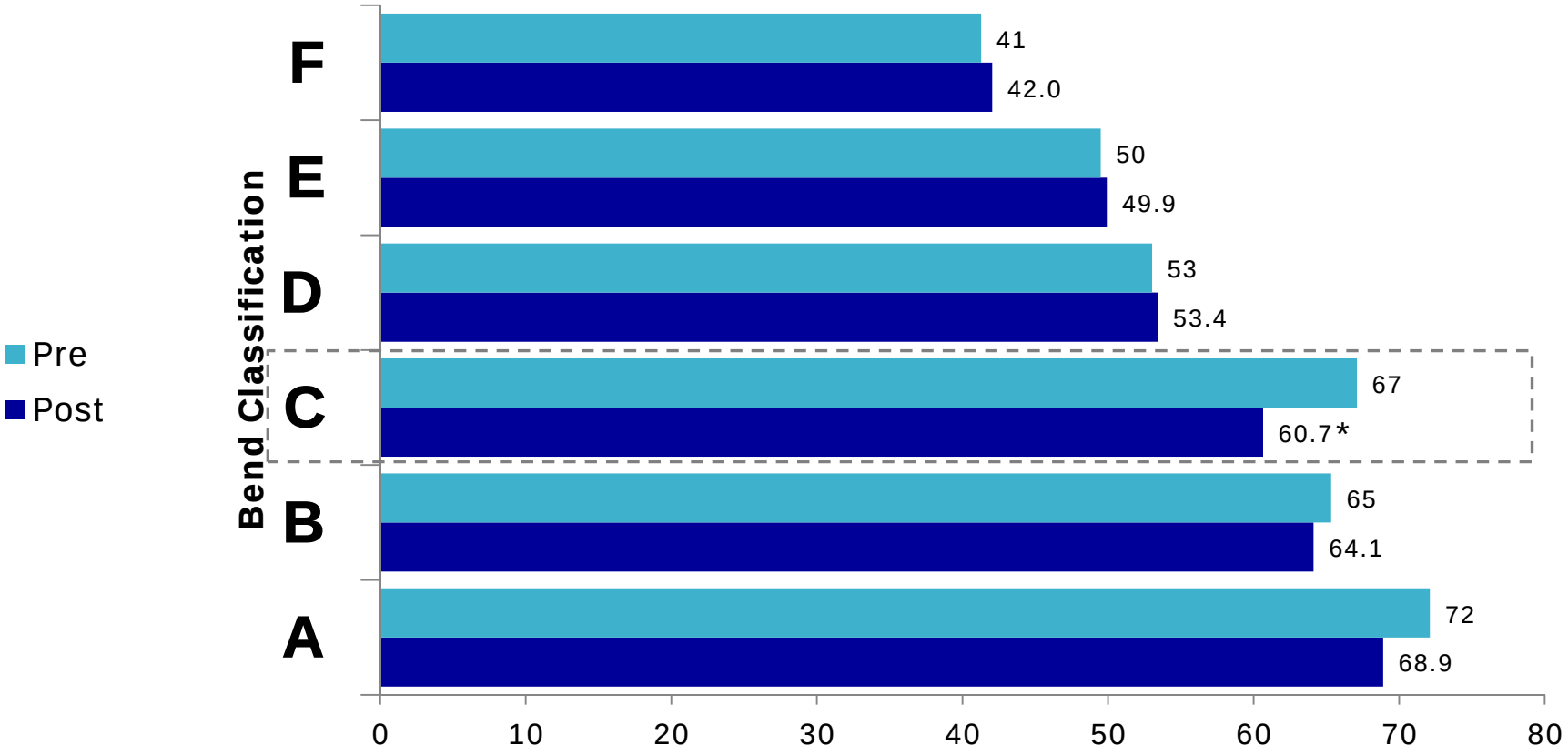
*indicates difference from all respondents with statistical significance at 95%

On dry roads, the average speed on rural roads when cornering started was significantly slower in the Post-launch phase



*indicates difference from all respondents with statistical significance at 95%

On wet roads, the average speed on rural roads when cornering started for most bend types was almost the same in the Post-launch phase; with only minor, non significant differences observed.



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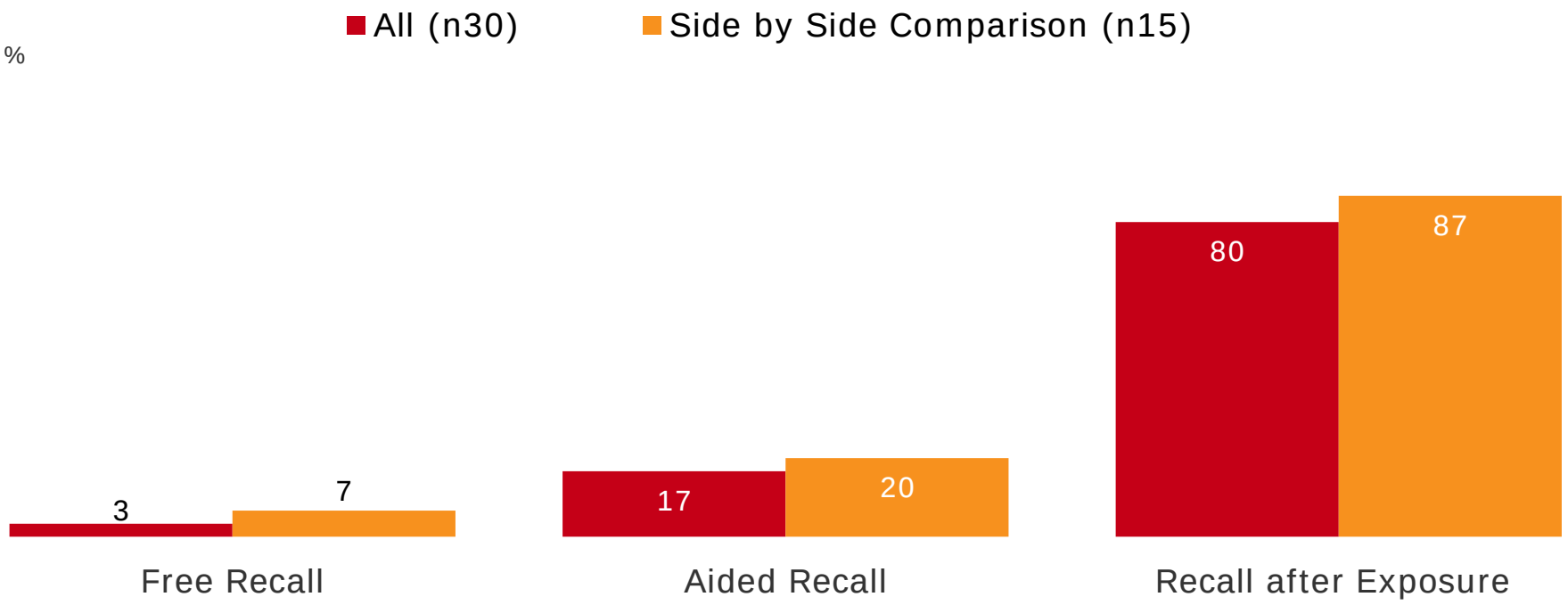
6
Behavioural study survey

One in five recognise the ads & the majority remember the campaign having just viewed them as part of a reel of six ads



Q1. What is your favourite advert that you have seen in the last 6 months (if you do not have a favourite advert – which one sticks in your mind most) & Q2.What other ads can you remember seeing?
Q3. Sometimes, not all adverts come to mind readily. In the last month, which of these brands, products or topics have you seen or heard adverts for either: on TV, while watching Video on Demand (such as 4oD, ITV Player, Demand Five or YouTube), on the radio, in the cinema, on the internet, on Twitter or on Posters while out and about . Please select all that apply:
hat videos / adverts can you remember being shown during this survey? Please try to remember all the advertised brands, products or topics.

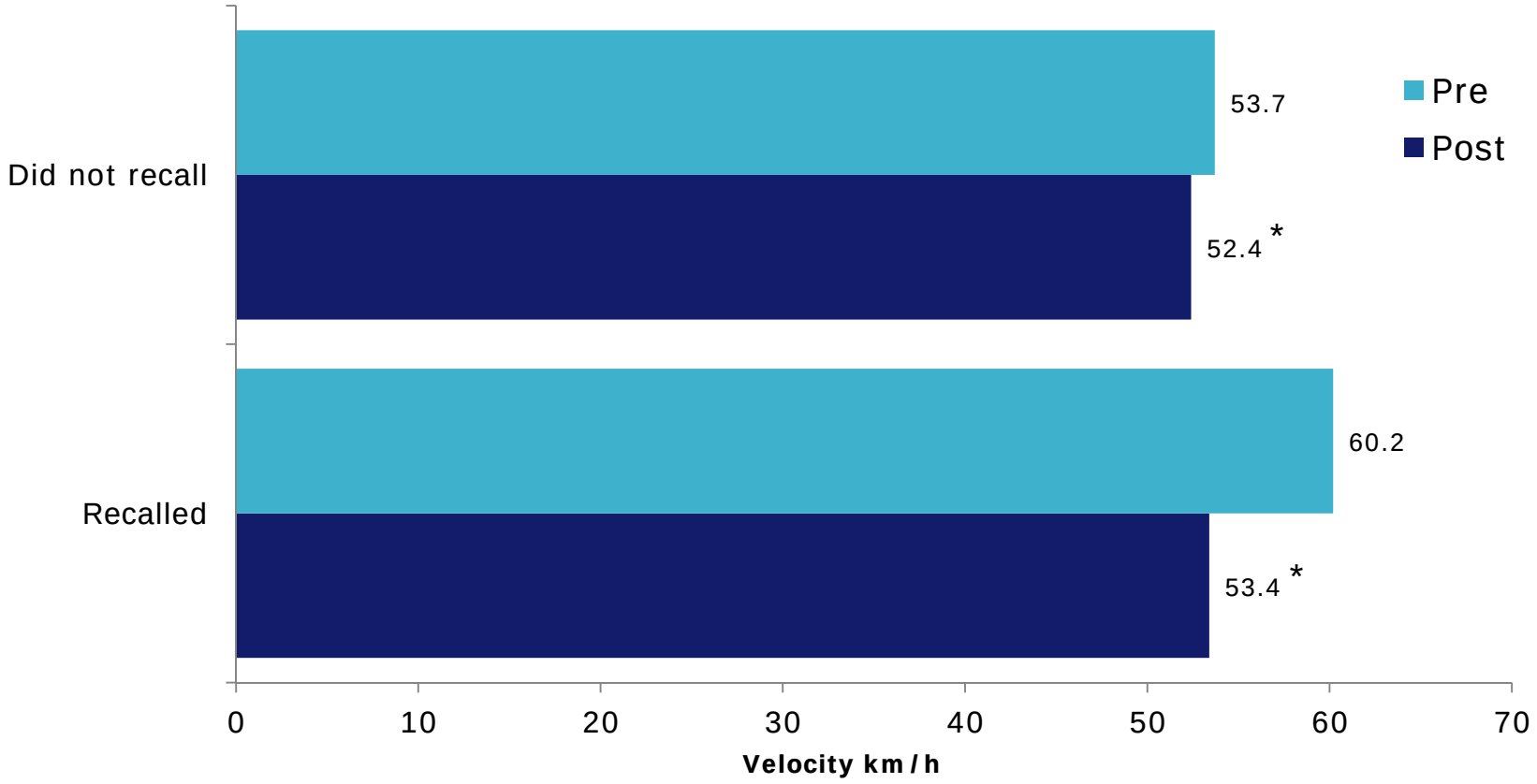
Those who remembered seeing the ad showed the greatest reduction of average speed in the second phase of driver behaviour tracking

Phase	Did not Remember	Did Remember
Pre	53.7	60.2***
Post	52.4	53.4***

Average Velocity in km/h

*indicates difference from all respondents with statistical significance at 95%

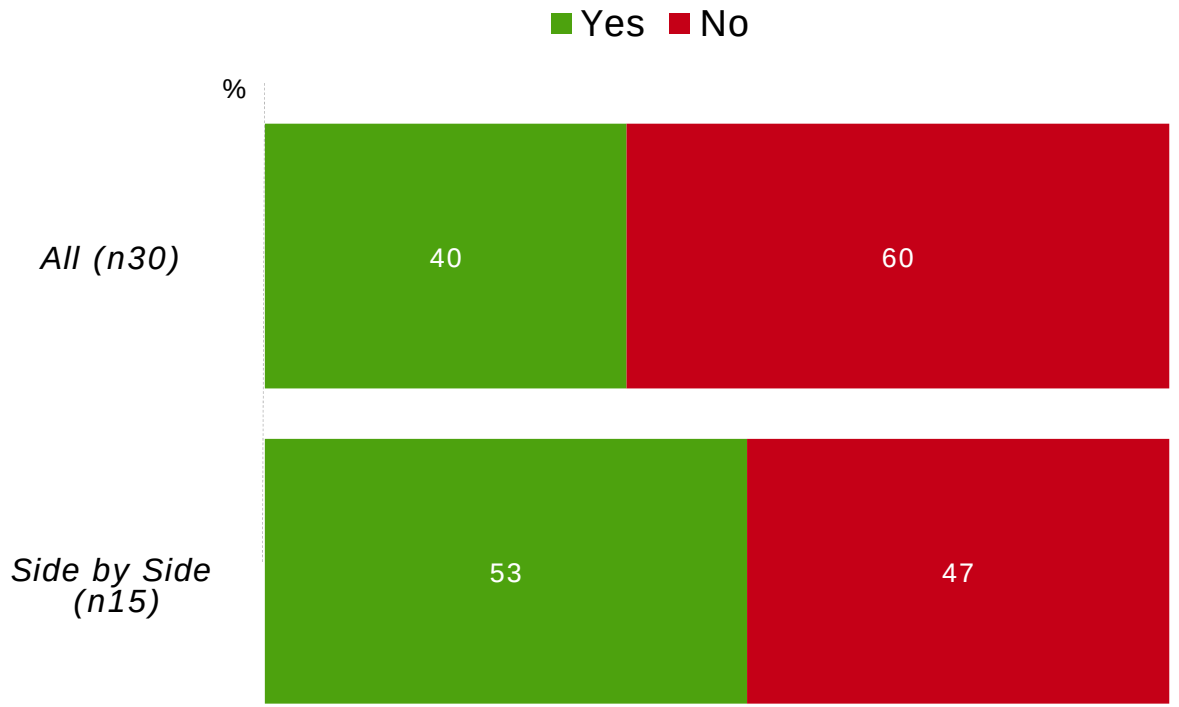
The average speed on country roads Post exposure was significantly slower for those who recalled seeing or hearing the ad



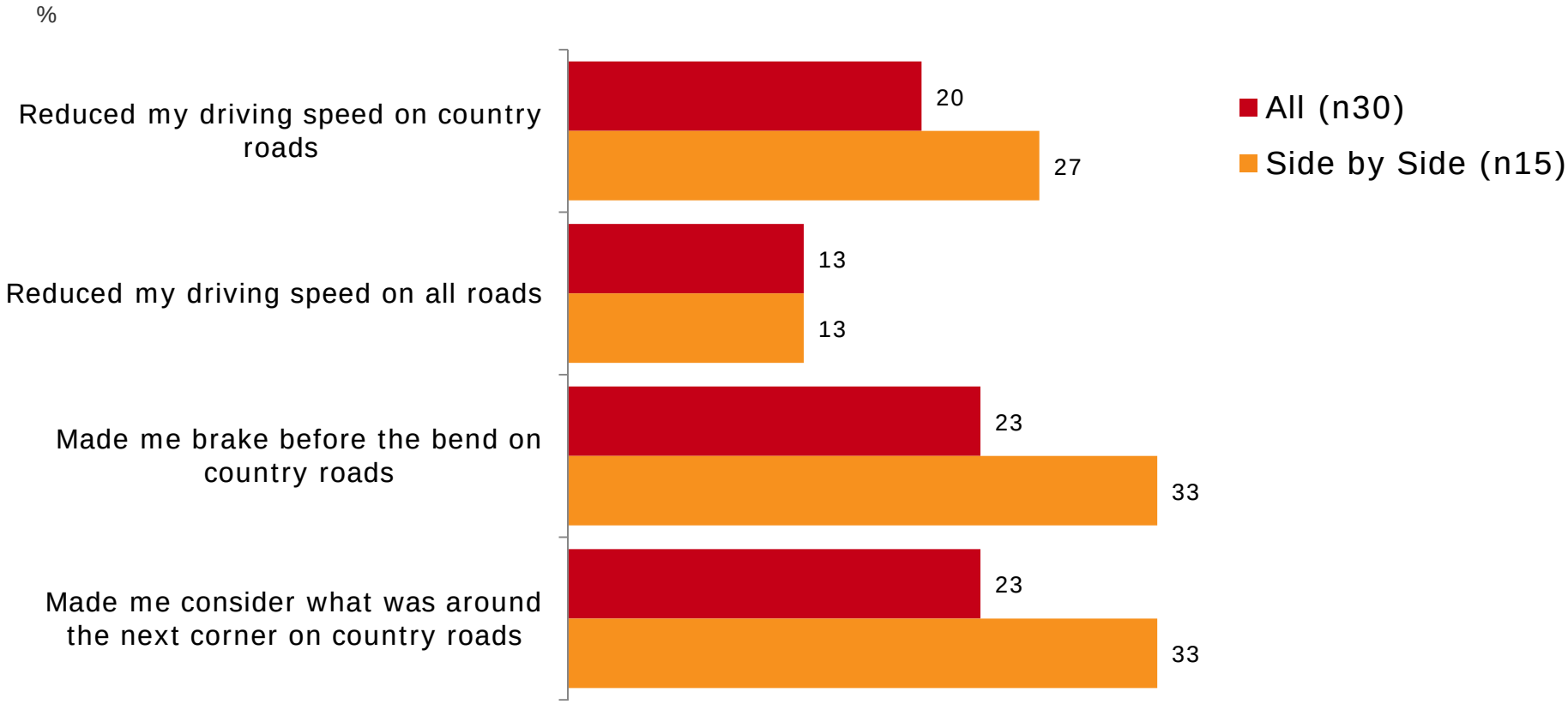
*indicates difference from all respondents with statistical significance at 95%

Around half the drivers claimed seeing the campaign altered their driving in some way in the second phase of driver behaviour tracking

In your opinion - once you saw the THINK! campaign Country Roads advert as part of our survey or elsewhere - do you believe it altered how you drove in the second phase of driving tracking?



The claimed effect of the campaign on driver behaviour in the second phase related most to their driving on country roads



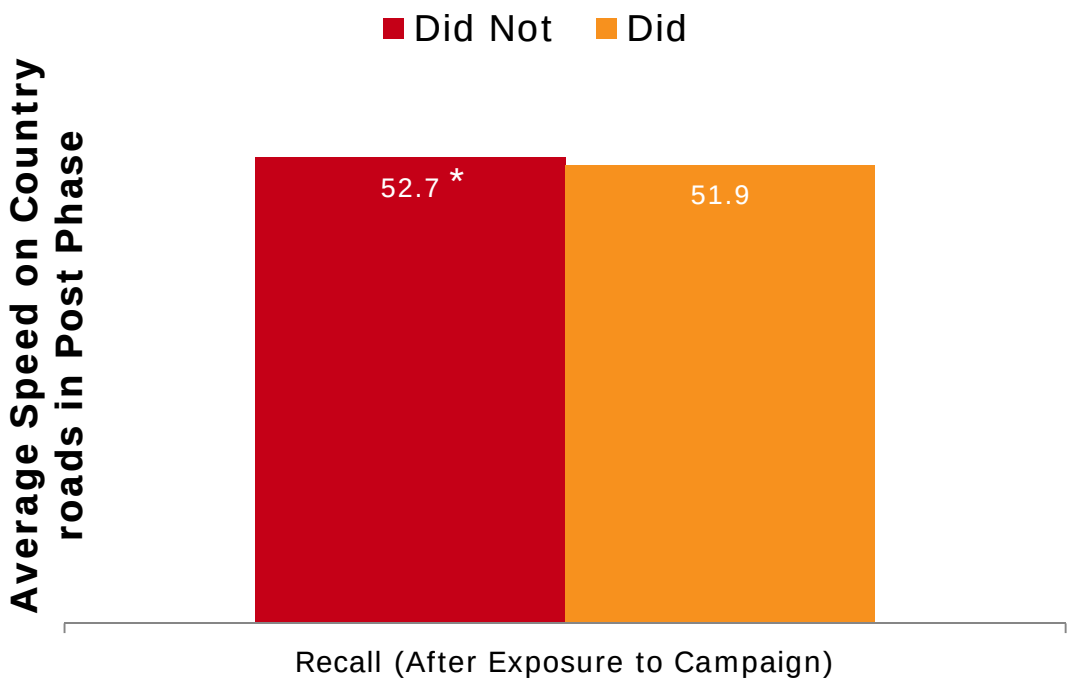
Q3. In what way did it alter your driving during the second phase of driving tracking?

Average Speed on rural roads in Post Phase for those who did and did not

Post Phase	Free Recall	Aided Recall	After Exposure Recall	Seen Campaign Elsewhere	Reduced Speed Rural Roads	Brake Before the Bend	Consider what was around bend
Did not	52.6	51.3	52.7	52.4	53.3	50.9	53.5
Did	52.9	60.0***	51.9***	53.4	50.1***	54.5***	50.9***

ALL RESPONDENTS with data available in phase 2

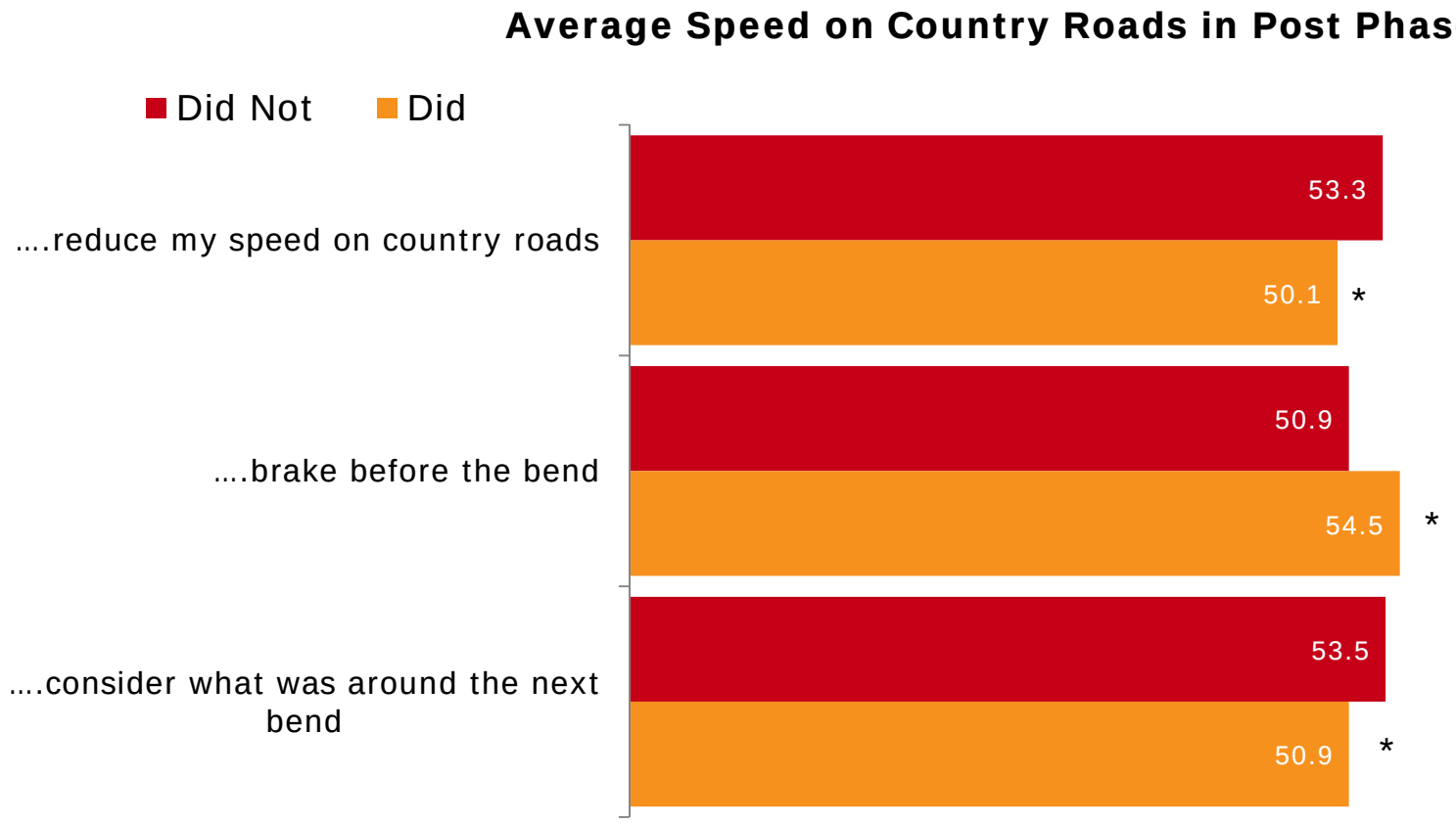
Those who recalled seeing the ad drove slower on rural roads in the post phase



Q1What is your favourite advert that you have seen in the last 6 months (if you do not have a favourite advert – which one sticks in your mind most)? Any others you remember that aren't your favourites but that you remember?
Q2. Sometimes, not all adverts come to mind readily. In the last month, which of these brands, products or topics have you seen or heard adverts for either: on TV, while watching Video on Demand (such as 4oD, ITV Player, Demand Five or YouTube), on the radio, in the cinema, on the internet, on Twitter or on Posters while out and about .
Q3. What videos / adverts can you remember being shown during this survey? Please try to remember all the advertised brands, products or topics.
POST Survey Q1. Apart from in our survey you completed a few weeks ago, do you remember seeing this ad anywhere else in the past month?
Base: Post stage: All motorists (15)

*indicates difference from all respondents with statistical significance at 95%

Drivers who claimed that the campaign reduced their speed in the post phase, drove slower than those who claimed it made no difference



POST SURVEY Q4, In what way did it alter your driving during the second phase of driving tracking?

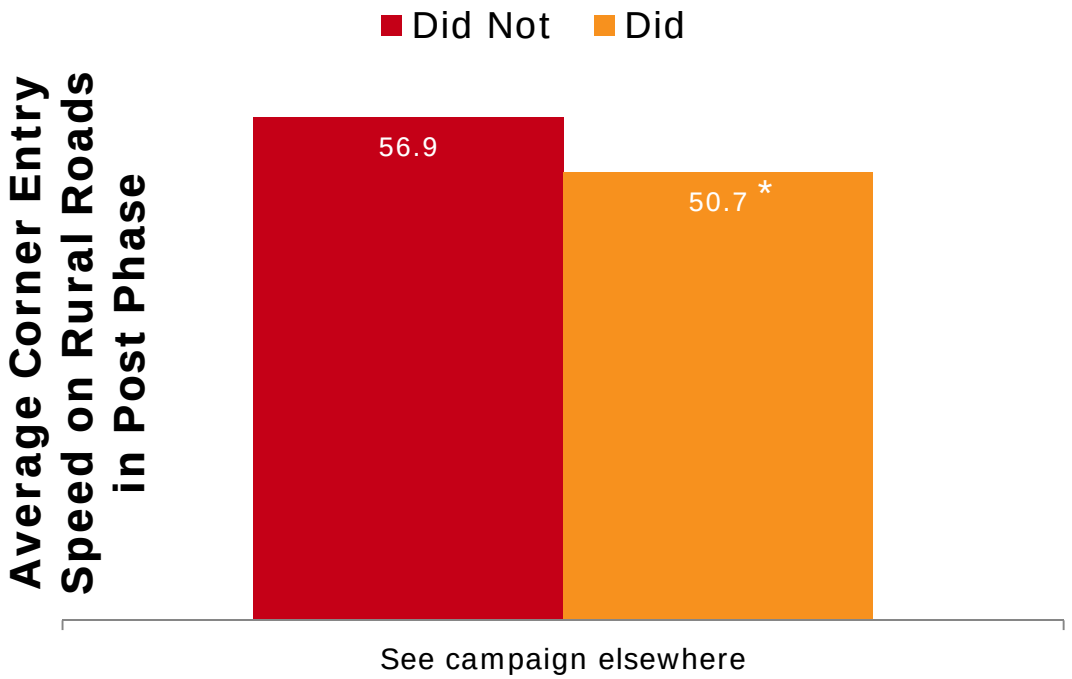
*indicates difference from all respondents with statistical significance at 95%

Average Speed into corners on country roads in Post Phase

Post Phase	Free Recall	Aided Recall	After Exposure Recall	Seen Campaign Elsewhere	Reduced Speed Rural Roads	Brake Before the Bend	Consider what was around bend
Did not	55.3	54.7	55.3	56.9	57.6	54.3	56.5
Did	56.8	59.9***	55.6	50.7***	49.2***	56.1**	53.1***

ALL RESPONDENTS with data available in phase 2

Those drivers who said they had seen the ad elsewhere (multiple exposures) showed significantly slower corner entry speeds than those exposed only in the survey.

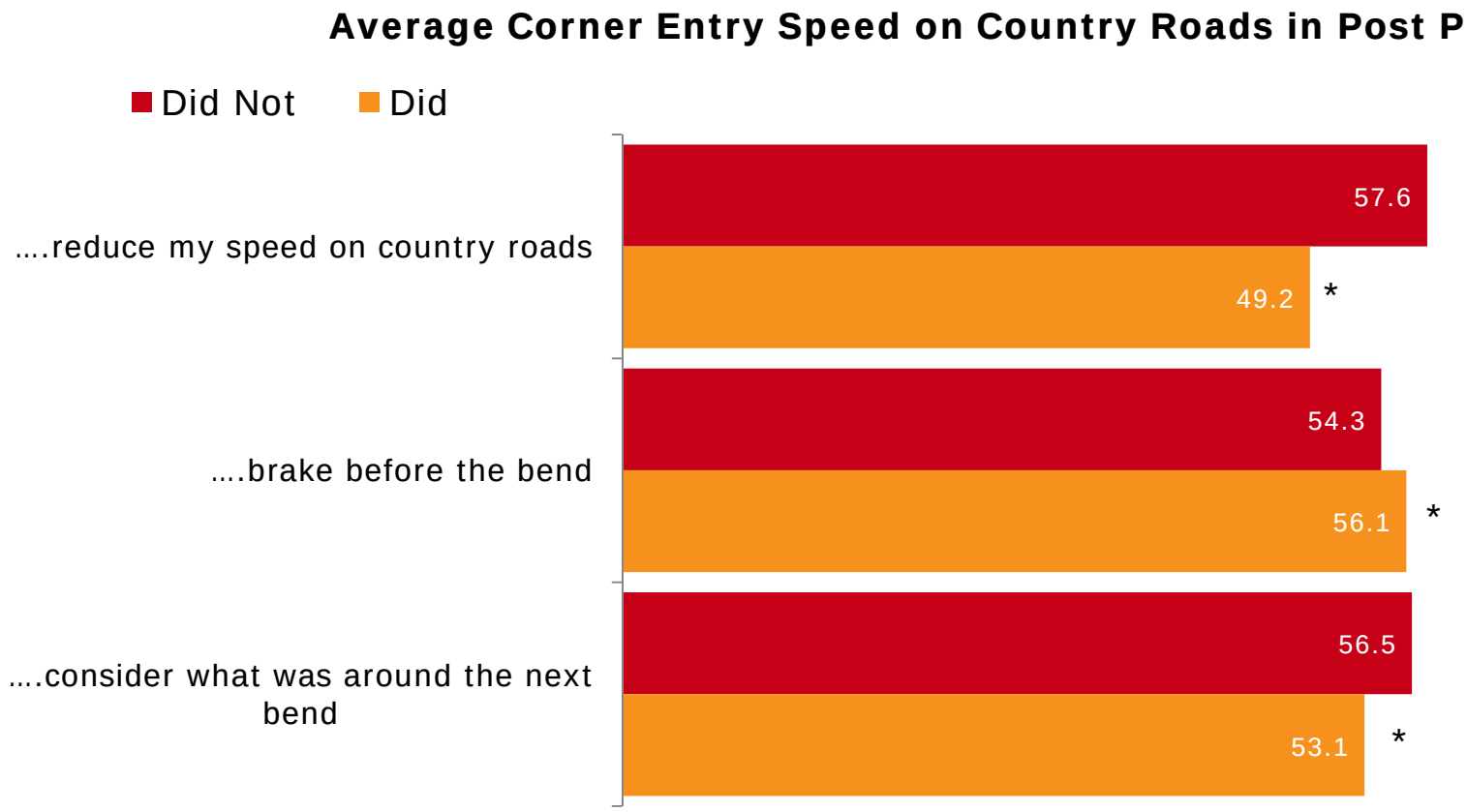


As part of post survey

POST Survey Q1. Apart from in our survey you completed a few weeks ago, do you remember seeing this ad anywhere else in the past month?
Base: Post stage: Side by Side ocmparison (15)

*indicates difference from all respondents with statistical significance at 95%

Drivers who claimed that the campaign reduced their speed in the post phase also drove slower as they entered corners, but it did not make them brake before the bend (as they claimed)



POST SURVEY Q4, In what way did it alter your driving during the second phase of driving tracking?

*indicates difference from all respondents with statistical significance at 95%

Summary of Behavioural study

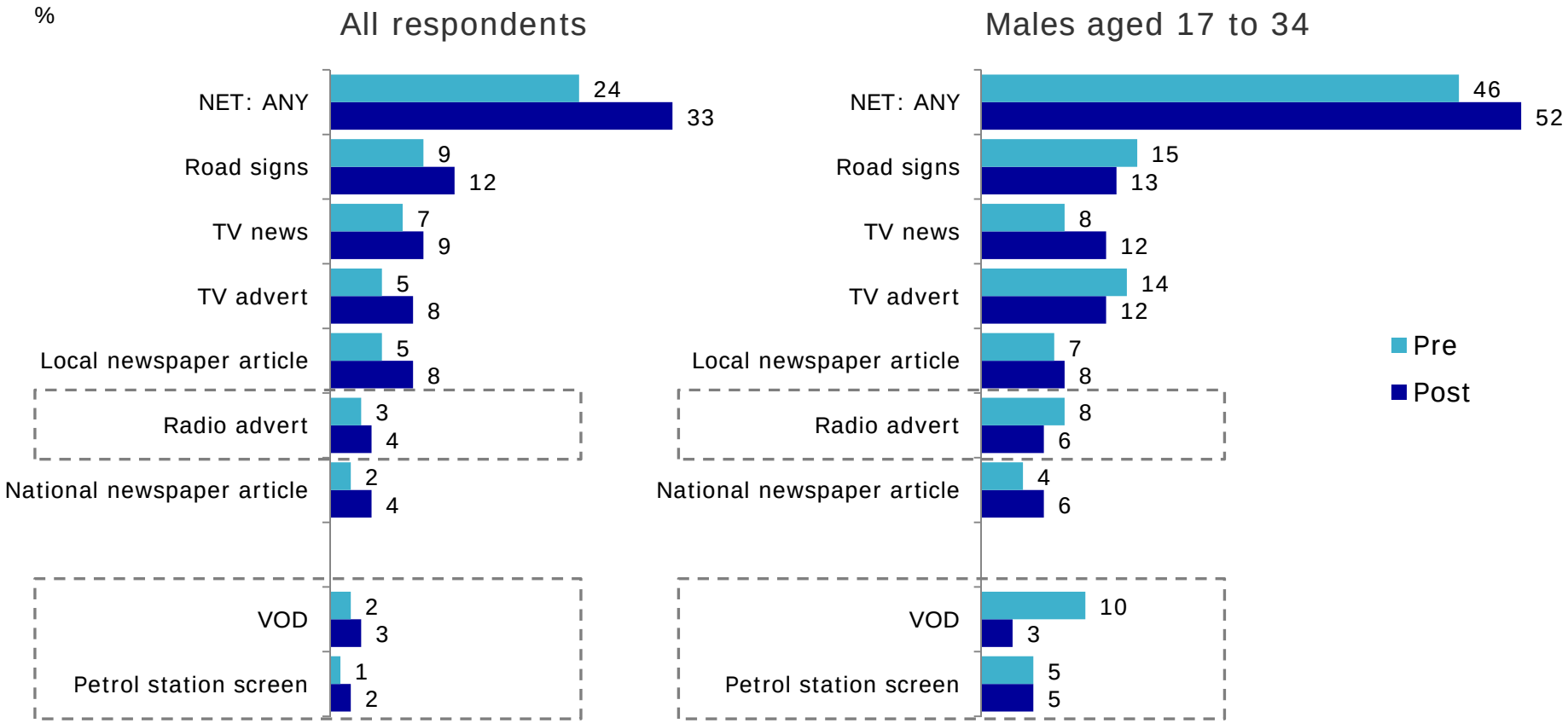
Key Insights

- Multiple exposures to the campaign increases its effectiveness in reducing speed before the bend
- The campaign is effective in increasing the distance before the bend at which drivers start braking on the most dangerous types of corners (with the least visibility) on rural roads.
- The campaign is effective in decreasing overall average speed and specifically corner entry speed on rural roads

7

Campaign awareness and recognition

There is more external noise around driving on country roads at the post stage, although not specifically via campaign channels



*indicates difference from all respondents with statistical significance at 95%

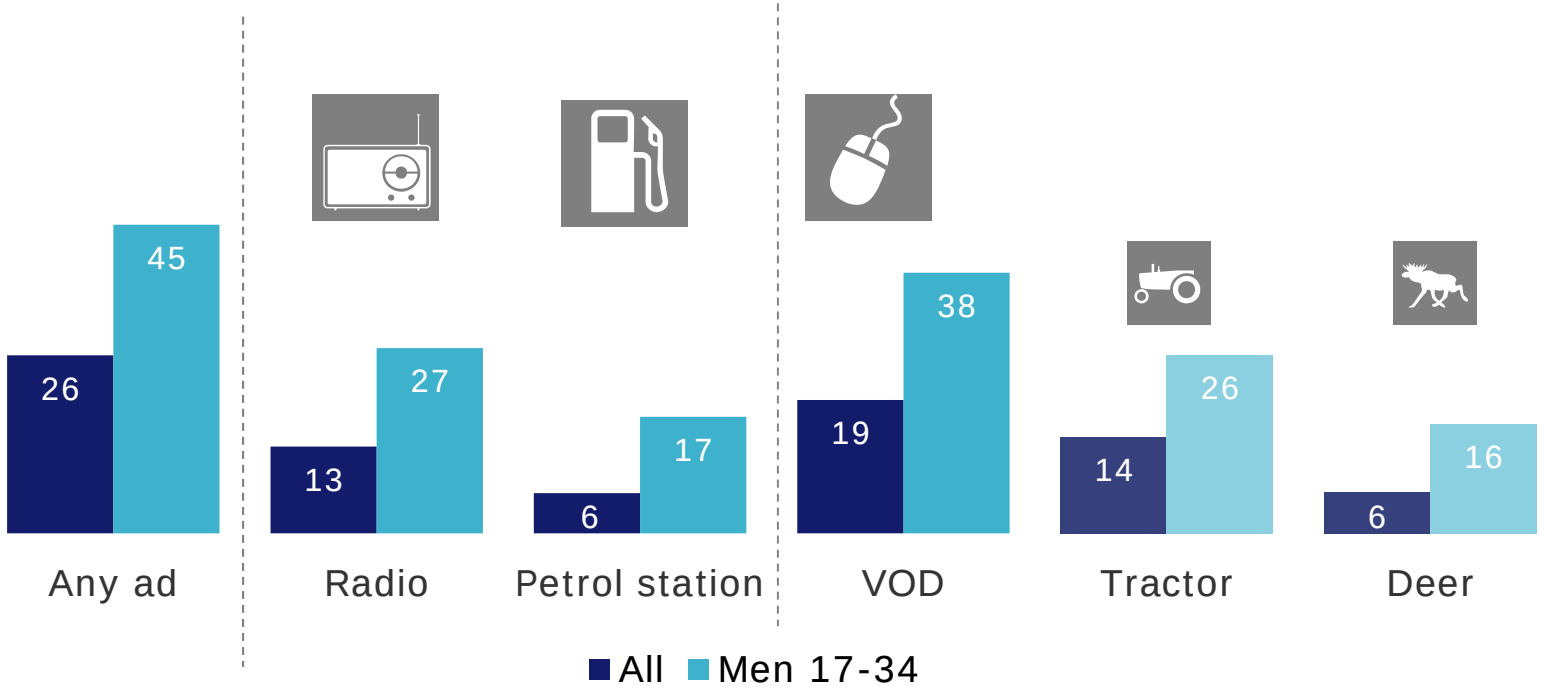
Q7. Have you seen or heard anything about driving on country roads in any of these ways recently?
SHOWN: media used and all answers give by 4% or more at post stage
Base: All respondents (Pre stage 750; Post stage 751) men 17-34 (Pre stage 250; Post stage 248)

Limited campaign messaging recalled spontaneously

13 %	Accident(s)
8 %	Fatalities/fatal accident (red routes)
7 %	Danger / Hazards
6 %	David Coulthard safety advert
5 %	Road safety advert
5 %	More accidents on country roads than other roads
4 %	Animals on road
4 %	Danger signs
3 %	Newspaper articles
3 %	Slow down
3 %	Flooded roads (signs)
3 %	Good (no detail)
3 %	Not knowing what is around the bend / ahead
3 %	Speed

Q8. What do you remember seeing or hearing about driving on country roads recently?
Base: All who have seen or heard about driving on country roads at post stage (282)

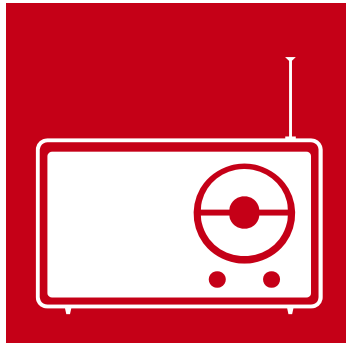
Campaign recognition at an overall level was relatively low



Q10a. Have you heard this ad, or a similar ad on the radio before? Q11a. Have you seen this ad at a petrol station recently? Q12a. Have you seen either of these videos recently on TV, a catch up service or the internet?
Base: All respondents at post stage (751) / men aged 17-34 (248)

8
Campaign communication

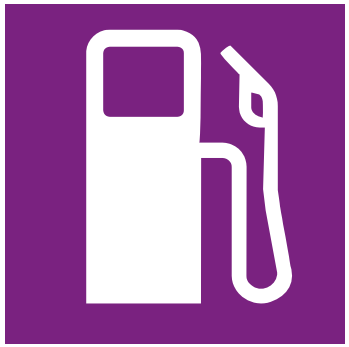
Reasonable message take out from the radio ads



All		Men 17 to 34
34%	**Brake before bend**	**24%**
14%	**Anticipate unexpected hazards**	**6%**
14%	**Brake before bend not on it**	**7%**
9%	**You don't know what is around the bend**	**4%**
9%	**Drive carefully on country roads**	**6%**
8%	**Watch your speed**	**4%**
4%	**Think ahead**	**3%**
4%	**Think**	**3%**
3%	**Look out for farm vehicles / animals**	**1%**

Q10b. What do you think was the main message of the radio ad which I have just played to you?
Base: Post stage: All motorists (751)/male drivers aged 17-34 (248)

Limited message take out from the petrol station ads



All		Men 17 to 34
26%	Watch your speed	15%
18%	Brake before bend	15%
10%	You don't know what is around the bend	5%
9%	Anticipate unexpected hazards	4%
8%	Take care on country roads	9%
7%	Country roads are more dangerous	6%
4%	60% of deaths happen on country roads	5%
3%	More accidents on country roads	2%
3%	Be alert	0%
3%	Think	2%

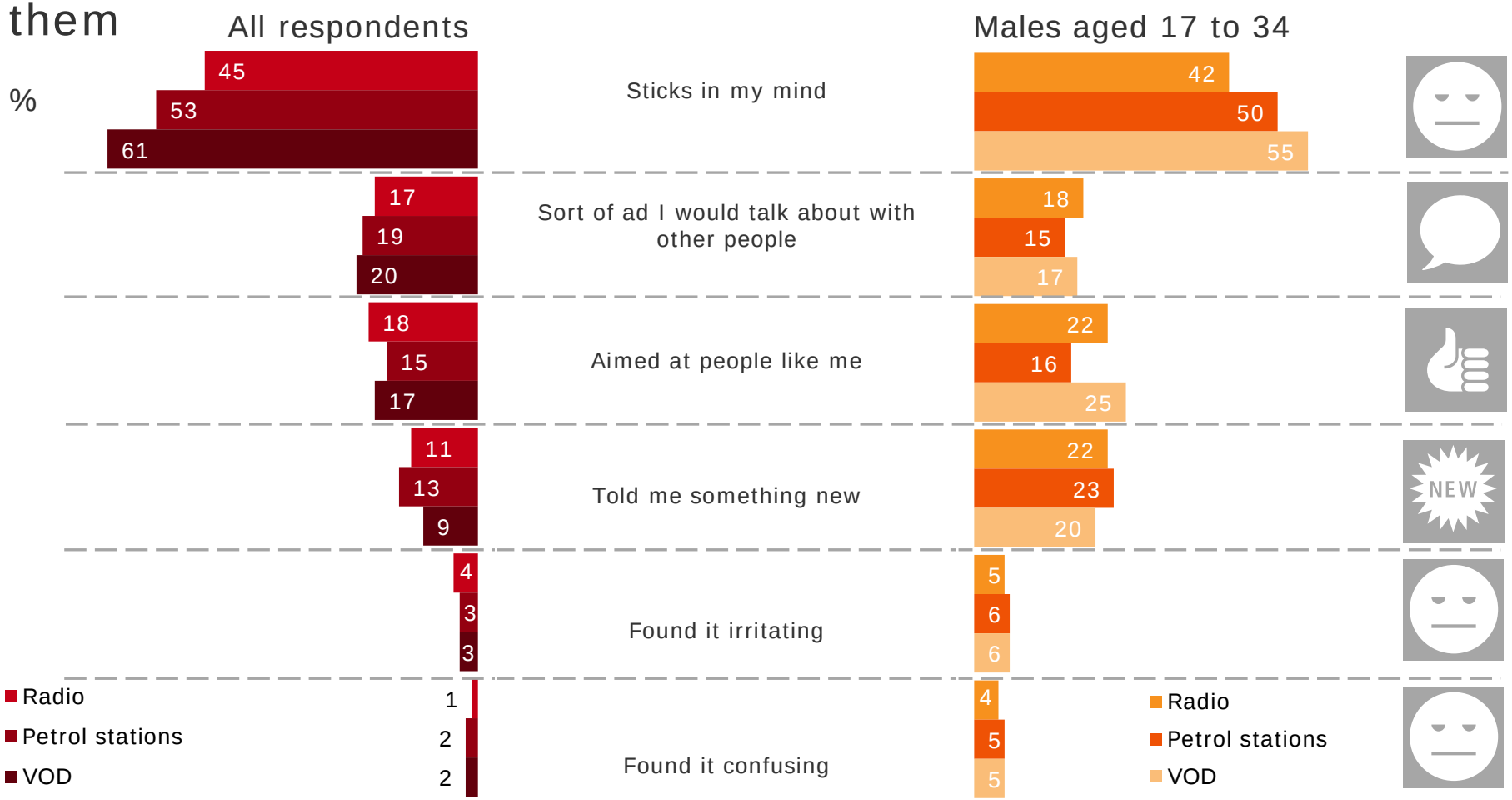
Q11b. What do you think was the main message of the advert which I have just shown you?
Base: Post stage: All motorists (751)/male drivers aged 17-34 (248)

Main message of VOD/online ads is better understood than other media

All		Men 17 to 34
42%	Brake before bend	27%
26%	Watch your speed	15%
15%	You don't know what is round the bend	8%
13%	Anticipate unexpected hazards	7%
9%	Brake before bend not on it	8%
8%	Drive carefully on country roads	7%
3%	Allow time/distance to brake	2%

Q18. What do you think was the main message of the adverts which I have just shown you?
Base: Post stage: All motorists (751)/male drivers aged 17-34 (248)

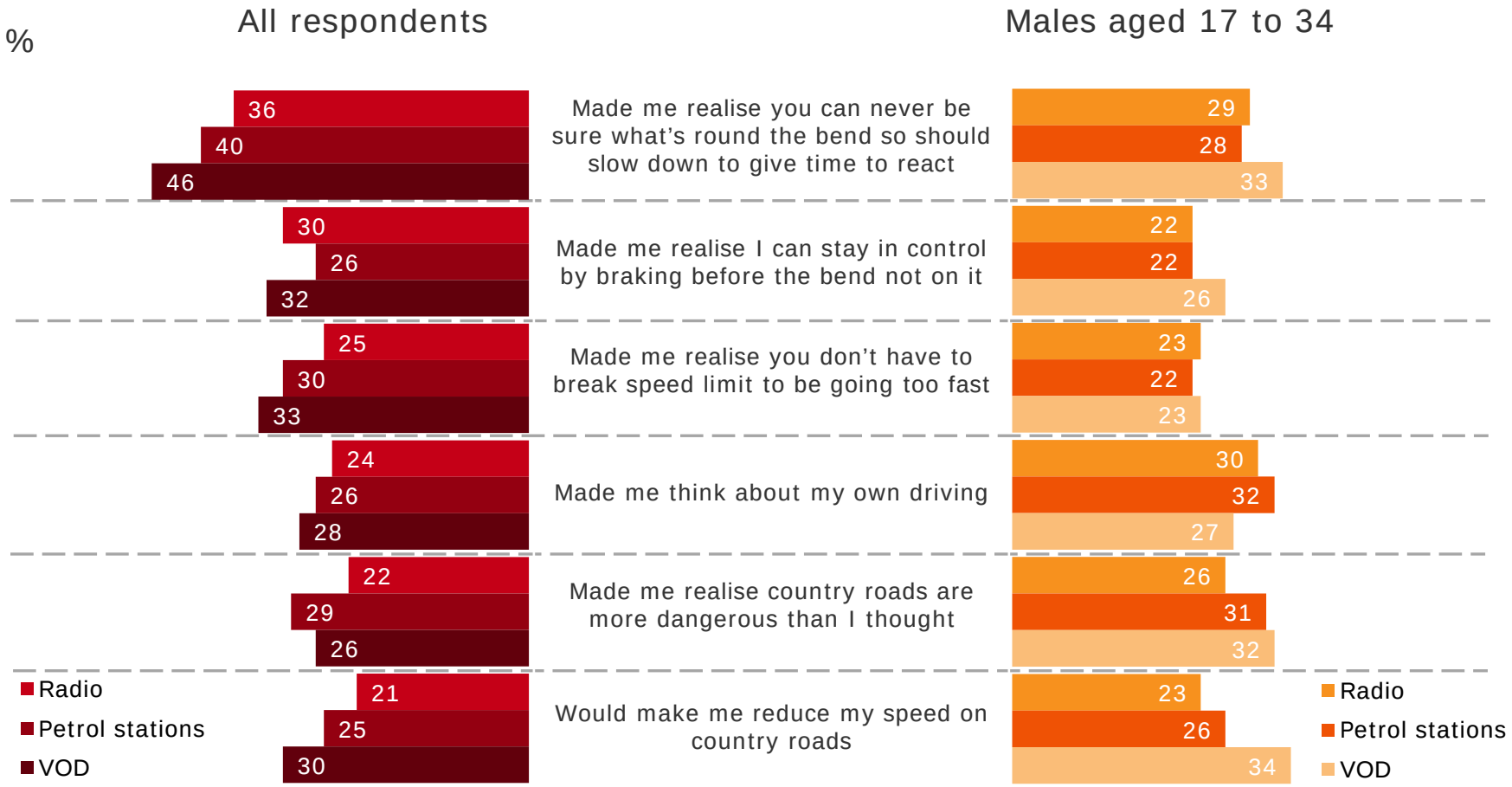
All three media recorded low levels of talkability though similar levels to other THINK! campaigns on being aimed at people like them



Q10c/11c/12c. Here are some things that other people have said about the ad that I have just played you. Which of these do YOU personally feel about the advert? Please mention all that you agree with.
Base: Post stage: All motorists (751) / Male motorists 17-34 (248)

*indicates difference from all respondents with statistical significance at 95%

Personal communication of messages generally higher for VOD/online



Q10d/11d/12d. Here are some things that other people have said about the ad that I have just played you. Which of these do YOU personally feel about the advert? Please mention all that you agree with.
Base: Post stage: All motorists (751) / Male motorists 17-34 (248)

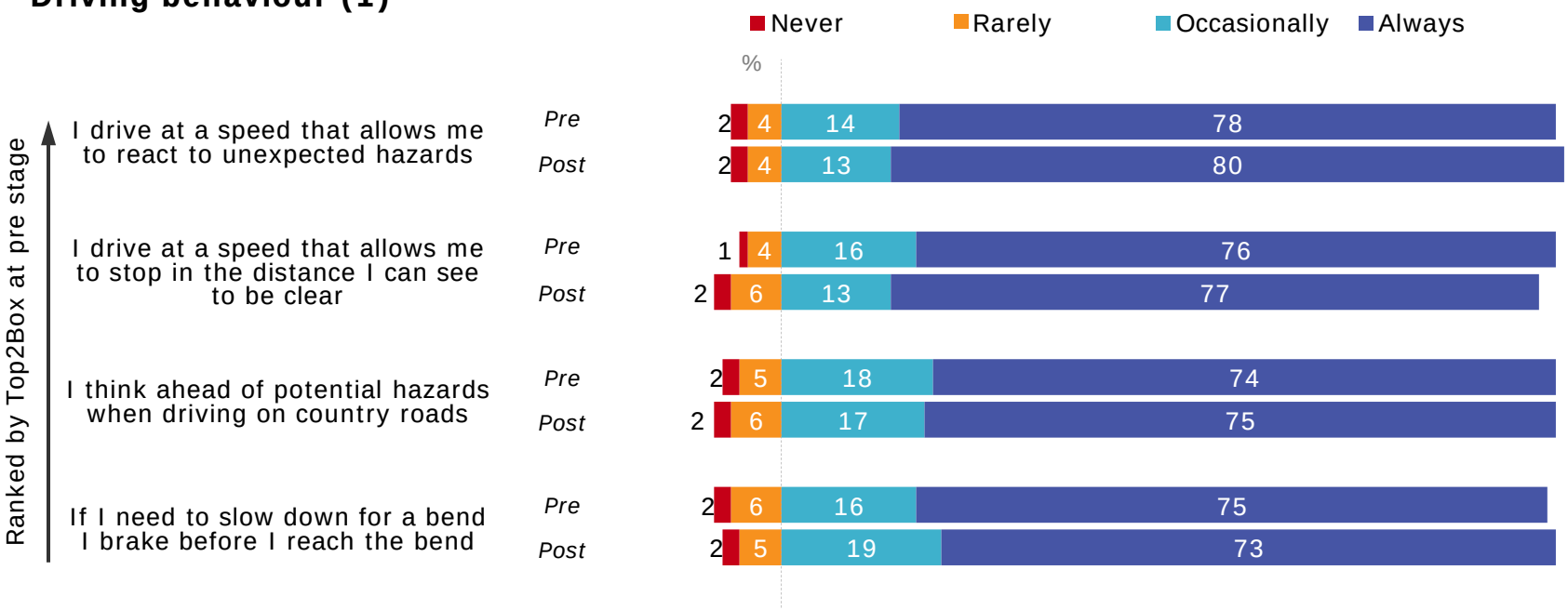
*indicates difference from all respondents with statistical significance at 95%

9

Attitudinal Changes – all drivers on country roads

Very little movement on driving behaviours pre to post amongst all drivers

Driving behaviour (1)

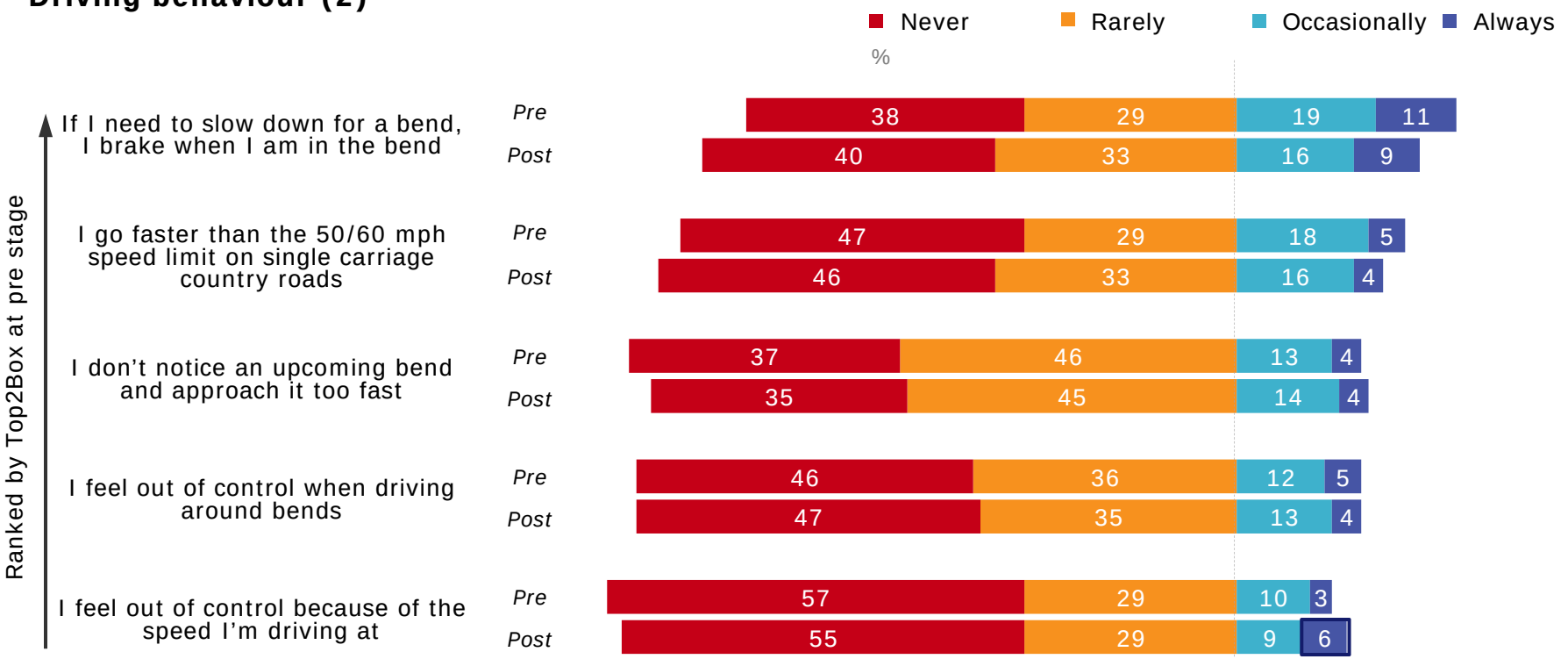


*'Don't know' not shown

Q5. How frequently, if at all, do you do each of the following on country roads?
Base: All respondents (Pre stage 750; Post stage 751)

Drivers slightly less likely to report slowing down in the bend and exceeding speed limit on country roads at post stage

Driving behaviour (2)

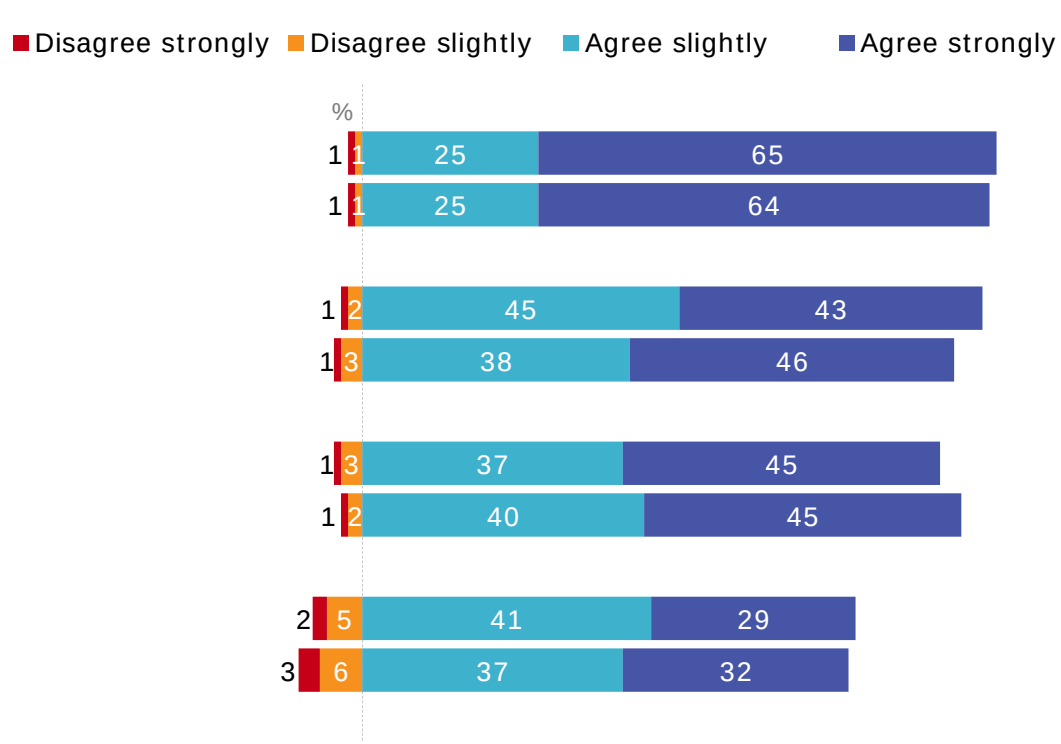


*'Don't know' not shown

Q5. How frequently, if at all, do you do each of the following on country roads?
Base: All respondents (Pre stage 750; Post stage 751)

Very little movement Pre to Post amongst all drivers

Statements about driving on country roads (1)

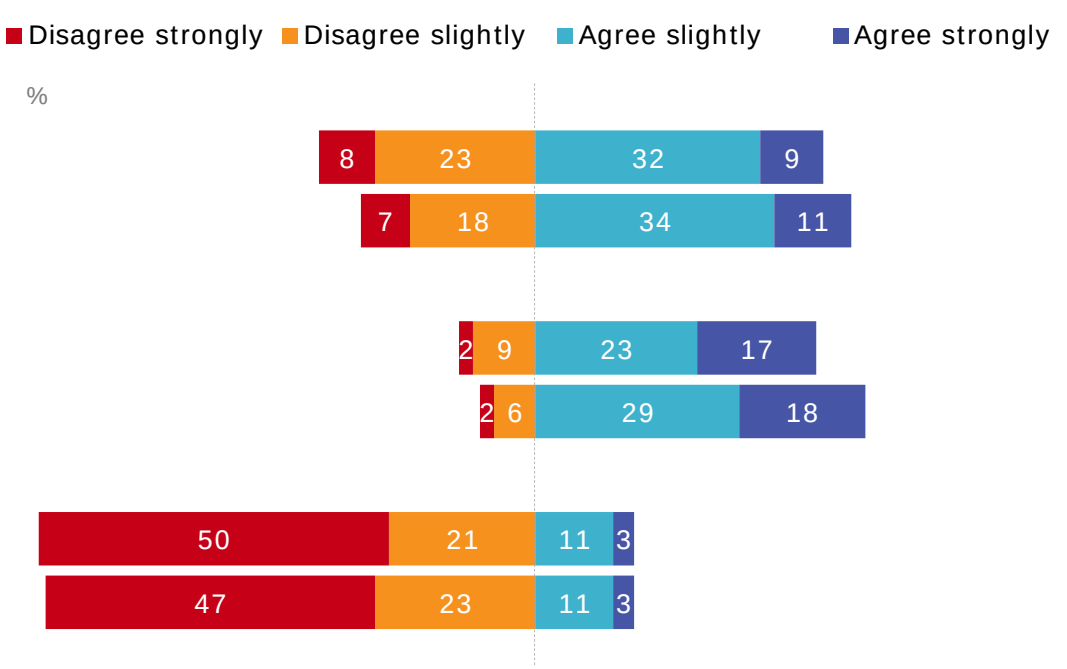


*'Neither agree nor disagree' and 'Don't know' not shown

Q6a. How much do you agree or disagree with the following statements?
Base: All respondents (Pre stage 750; Post stage 751)

Very little movement Pre to Post amongst all drivers

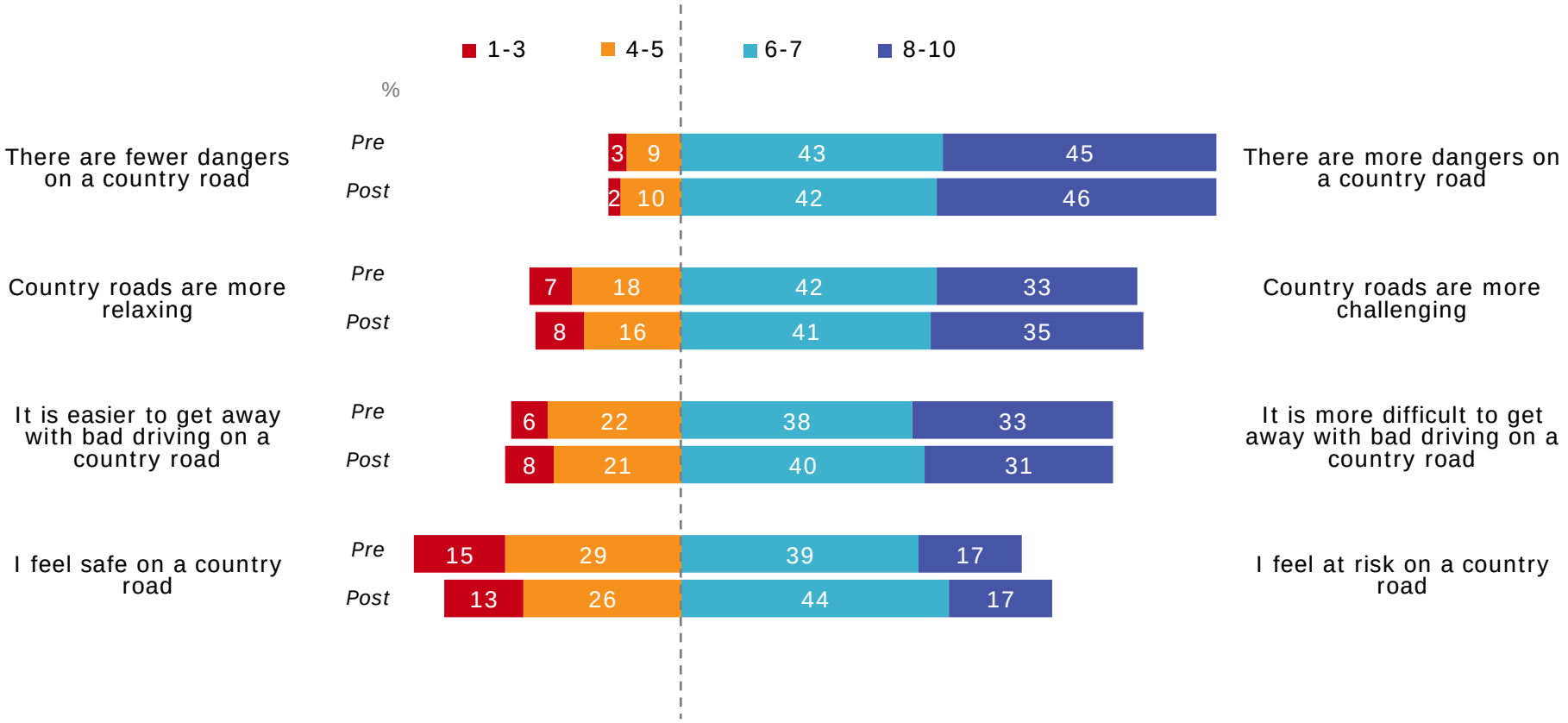
Statements about driving on country roads (2)



*'Neither agree nor disagree' and 'Don't know' not shown

Q6a. How much do you agree or disagree with the following statements?
Base: All respondents (Pre stage 750; Post stage 751)

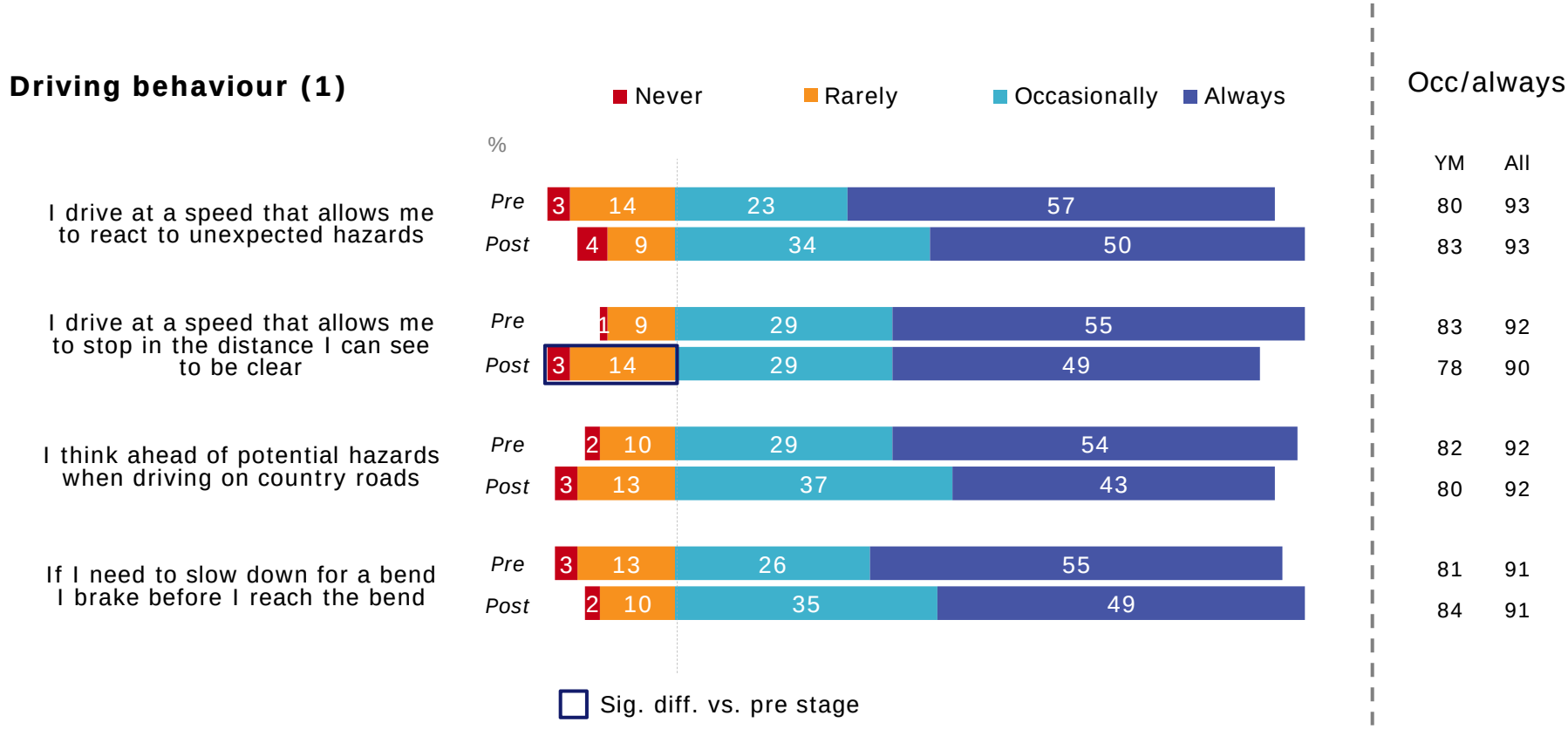
Very little movement Pre to Post amongst all drivers



Q6b. You are now going to see a series of two statements. For each set please drag the arrow to where on the scale you feel about driving on a country road compared to other types of roads?
Base: All respondents (Pre stage 750; Post stage 751)

10
Attitudinal Changes

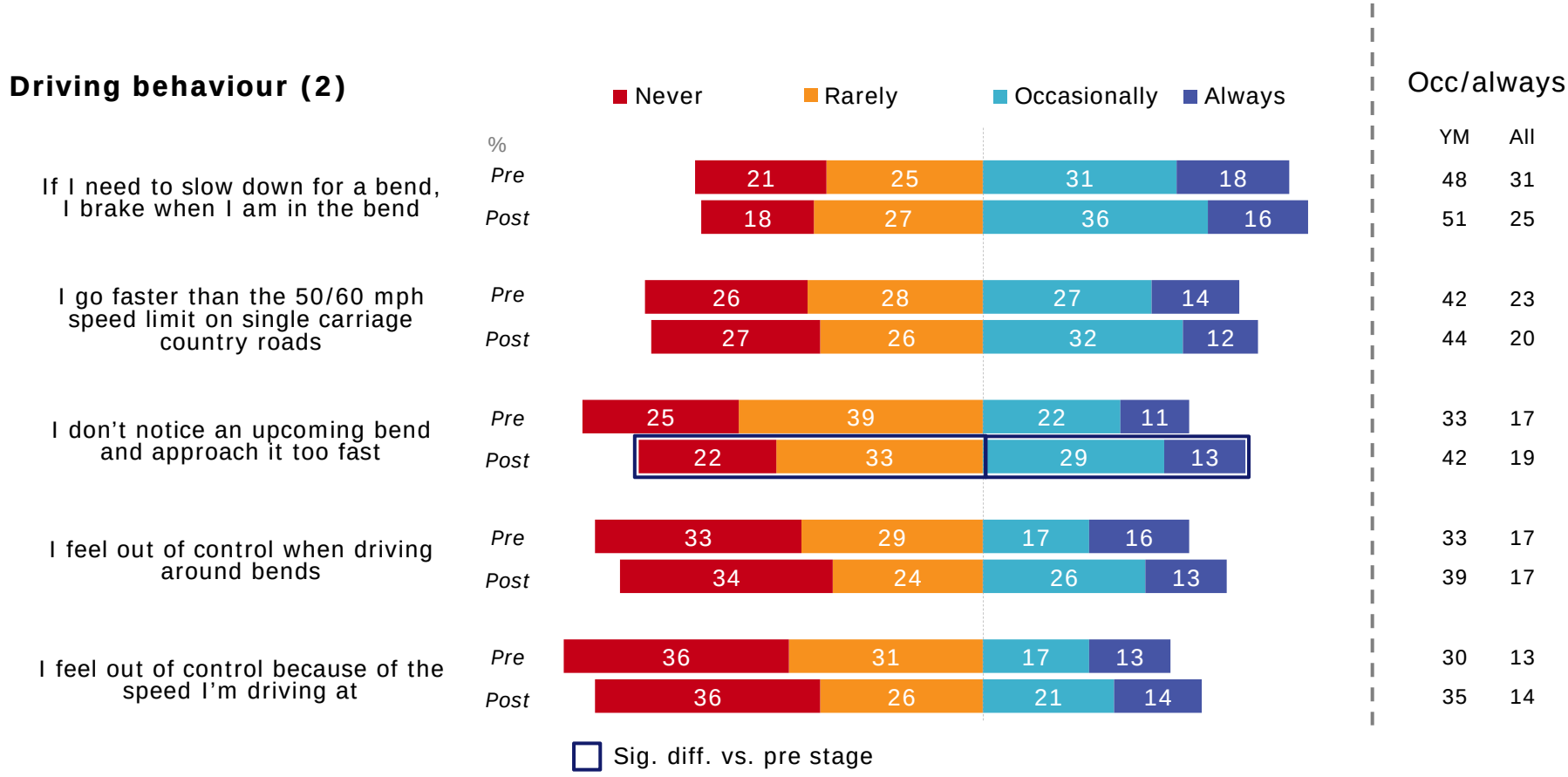
Amongst YMD, increased recognition at the Post wave that they don't always drive at a speed which allows them to stop in the distance they can see to be clear



Q5. How frequently, if at all, do you do each of the following on country roads?
Base: All male drivers aged 17-34 (Pre stage 250; Post stage 248)

*'Don't know' not shown

Higher recognition amongst YMD at the Post wave that they exhibit negative behaviours

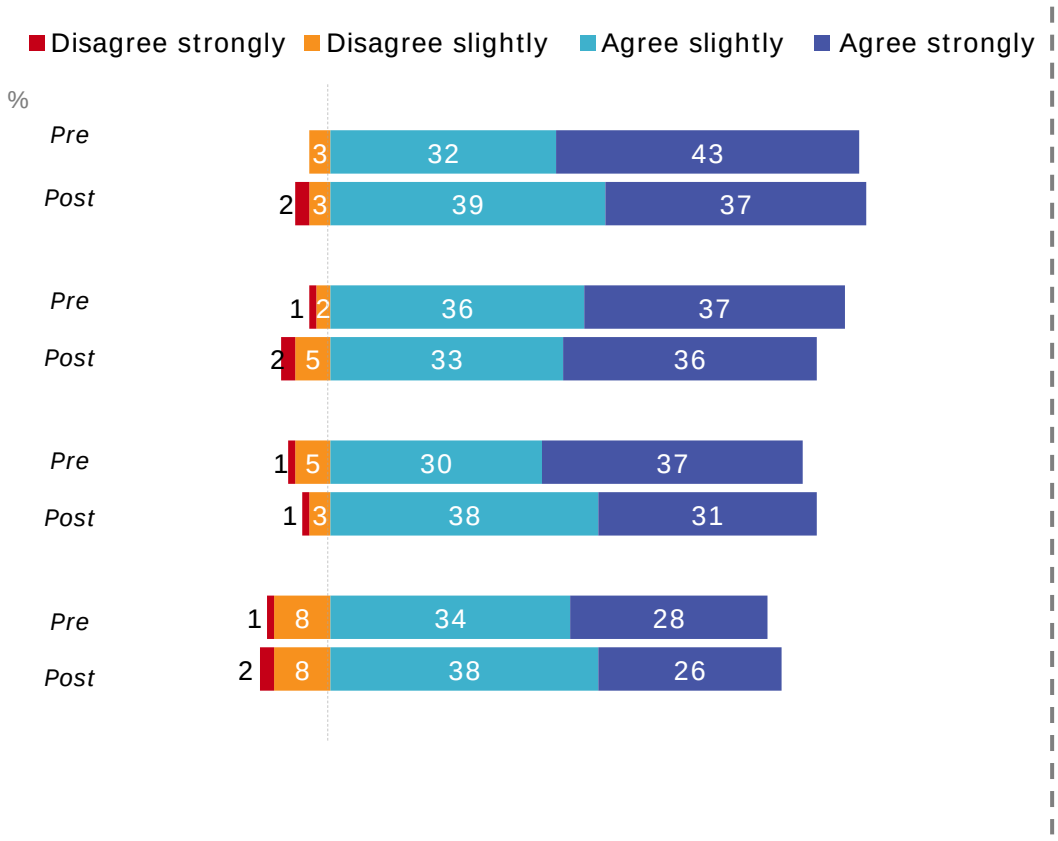


Q5. How frequently, if at all, do you do each of the following on country roads?
Base: All male drivers aged 17-34 (Pre stage 250; Post stage 248)

*'Don't know' not shown

No significant movements Pre to Post amongst YMD on attitudes to country roads

Statements about driving on country roads (1)



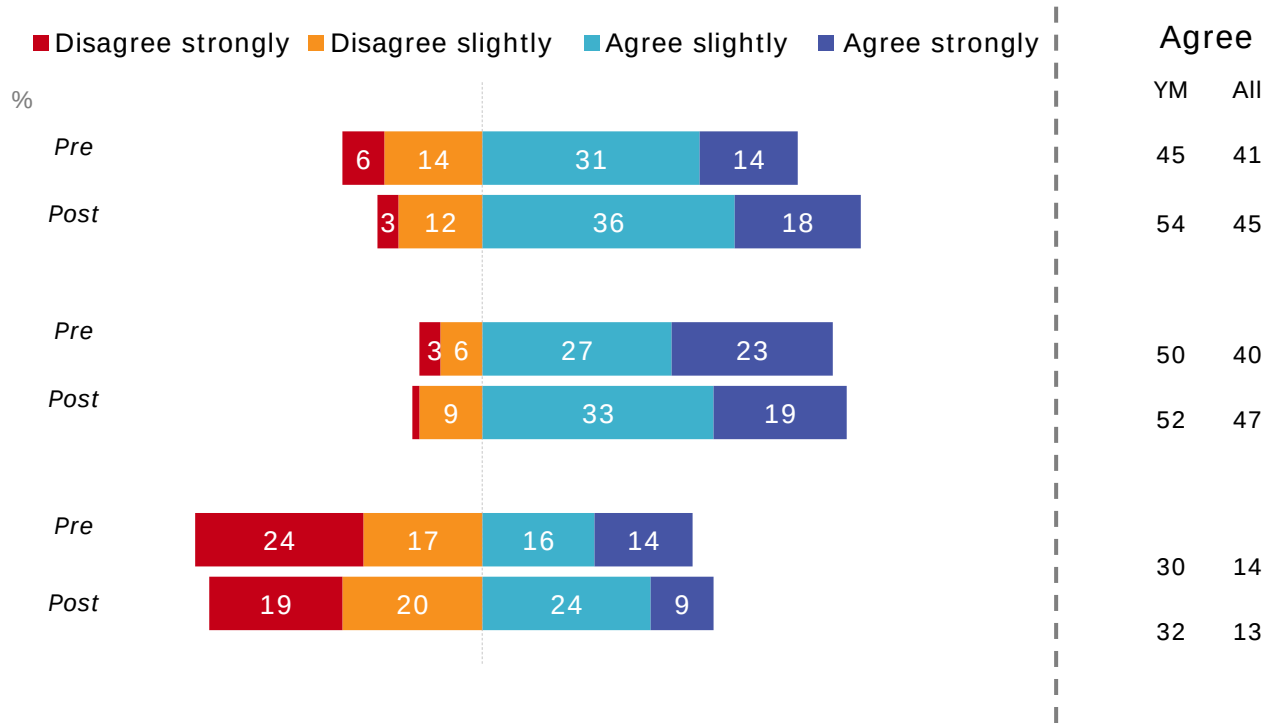
	Agree YM	Agree All
Even if you're familiar with a country road, you can't take it for granted because you can't be sure what's around a bend – Pre	75	90
Even if you're familiar with a country road, you can't take it for granted because you can't be sure what's around a bend – Post	75	89
Country roads are full of unexpected hazards – Pre	73	88
Country roads are full of unexpected hazards – Post	70	85
You don't need to be speeding to be going too fast on a country road – Pre	67	82
You don't need to be speeding to be going too fast on a country road – Post	69	85
It's easy to lose control on a country road – Pre	62	70
It's easy to lose control on a country road – Post	65	69

Q6a. How much do you agree or disagree with the following statements?
Base: All male drivers aged 17-34 (Pre stage 250; Post stage 248)

*'Neither agree nor disagree' and 'Don't know' not shown

Increased belief among YMD post campaign that people obey the speed limits on country roads

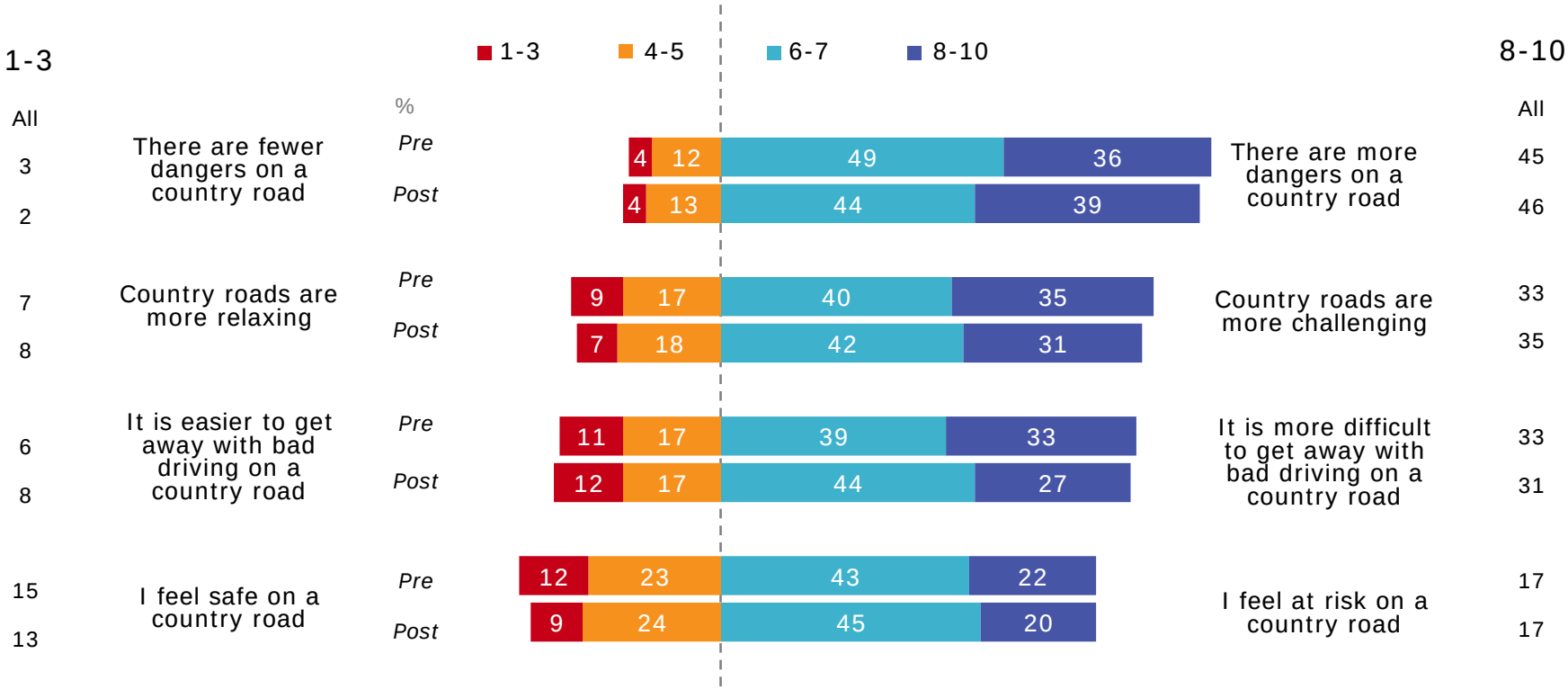
Statements about driving on country roads (2)



Q6a. How much do you agree or disagree with the following statements?
Base: All male drivers aged 17-34 (Pre stage 250; Post stage 248)

*'Neither agree nor disagree' and 'Don't know' not shown

No significant movement Pre to Post amongst YMD on statements relating to driving on a country road



Q6b. You are now going to see a series of two statements. For each set please drag the arrow to where on the scale you feel about driving on a country road compared to other types of roads?
Base: All male drivers aged 17-34 (Pre stage 250; Post stage 248)

11
Insights and Recommendations

Insight and recommendations

Research insights

The campaign worked well at decreasing overall average speed and corner entry speed on rural roads

Multiple exposures to the campaign increase its effectiveness in reducing speed before the bend

Take out and personal communication from the VOD/online ad is highest of all the media used

Attitudinally positive shifts from before to after the campaign amongst YMD in terms of recognition that they don't drive in the way they should

Recommendations

Continue with a campaign around this subject if rural roads continue to be a key policy concern

Increase OTS/OTH the campaign in order to affect behaviour

Consider running the ads on TV – should also increase synergy with radio to act as reminder

Continue with messaging if policy concern as campaign showing this group that they may not be driving correctly

Next steps and changes for the future Behavioural Study

Insight

Natural exposure to the campaign was low, for the campaign to be effective multiple exposures are required

Drivers do not consistently drive the same rural roads

Drivers do not know what a country road is so claim to drive on more rural roads than they actually do

Recommendations

Track drivers pre exposure and for a continuous period of up to 3 months afterwards thus increasing the chances of natural exposure to the campaign

Recruit more drivers than would be required at the start of the study and remove those drivers early on in the process who do not display the driving behaviour we need for the study

Recruit drivers who live in specific locations and drive to specific locations every day – thus forcing them to take a rural route, consider supplementing this with drivers who drive rural routes less frequently.

Any questions?